



# Writing Winning Sales Proposals

Writing Winning **Sales Proposals**<sup>™</sup>

an official Information Mapping® course



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**“Writing Winning Sales Proposals.”**

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# Table of Contents

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## Chapter 1 – Introduction

Overview.....	1-1
Proposal Types.....	1-2
Parts of a Standard Proposal.....	1-4
Exercise: Parts of a Standard Proposal.....	1-8
Challenges in Producing Successful Proposals.....	1-9
Three-Phase Proposal Development Process.....	1-10
Information Mapping Tools.....	1-11
Benefits of the Information Mapping Method.....	1-12
Summary.....	1-14

## Chapter 2 – Phase 1: Prewriting

Overview.....	2-1
Task 1: Analyze the Audience.....	2-2
Exercise: Analyze the Audience.....	2-5
Task 2: Determine the Proposal Strategy.....	2-6
Exercise: Determine the Proposal Strategy.....	2-8
Proposal Strategy Worksheet.....	2-9
Task 3: Develop a Content Outline.....	2-11
Content Identification Worksheet.....	2-12
Sequencing the Proposal.....	2-15
Summary.....	2-17

## Chapter 3 – Phase 2: Writing the Draft

Overview.....	3-1
Section A – New Units of Information	
Overview.....	3-A-1
Research-Based Principles.....	3-A-2
The Information Block.....	3-A-3
Example: Information Blocks.....	3-A-6
Block Labels.....	3-A-8
Exercise: Label the Blocks in a Proposal.....	3-A-9
The Information Map.....	3-A-10
Example: The Information Map.....	3-A-11
Example: Estimated Schedule, Fees, and Expenses.....	3-A-12
Exercise: Develop a Map.....	3-A-13
Exercise Workspace.....	3-A-14
Exercise: Write the Customer Needs Map.....	3-A-15
Writing the Customer Needs Map.....	3-A-16

---

*Continued on next page*

## Table of Contents , Continued

---

### Chapter 3 – Phase 2: Writing the Draft, Continued

#### Section B – Information Types

Overview .....	3-B-1
Six Information Types .....	3-B-2
Definitions and Examples of Information Types .....	3-B-3
Exercise: Identifying Information Types .....	3-B-5

#### Section C – Presenting Process Information

Overview .....	3-C-1
Stage/Description Table .....	3-C-2
Cause and Effect Process .....	3-C-5
Process Flow Chart .....	3-C-6
Branching Process Flow Chart.....	3-C-7
Cycle Chart .....	3-C-9
Guidelines for Presenting a Process.....	3-C-10
Exercise: Developing a Process for Your Proposal .....	3-C-11

#### Section D – Presenting Facts

Overview .....	3-D-1
Bullets and Numbers in Lists .....	3-D-3
Tables .....	3-D-5
Charts .....	3-D-6
Tailoring Facts to Your Audience.....	3-D-7
Guidelines for Presenting Facts .....	3-D-9
Exercise: Develop Facts for Your Proposal .....	3-D-10

#### Section E – Presenting Concepts

Overview .....	3-E-1
Definitions.....	3-E-2
Examples and Non-Examples .....	3-E-3
Guidelines for Presenting Concepts.....	3-E-5
Exercise: Developing Concepts for Your Proposal .....	3-E-6

#### Section F – Presenting Structures

Overview .....	3-F-1
Diagrams .....	3-F-2
Part/Function Tables .....	3-F-3
Guidelines for Presenting Structures.....	3-F-4

---

*Continued on next page*

## Table of Contents , Continued

---

### **Chapter 3 – Phase 2: Writing the Draft, Continued**

#### Section G – Presenting Principles

Overview .....	3-G-1
Presenting Principles .....	3-G-2
Important: Avoid “Burying” the Rules .....	3-G-4
Guidelines for Presenting Principles .....	3-G-7

#### Section H – Presenting Procedures

Overview .....	3-H-1
Step/Action Tables .....	3-H-2
Guidelines for Writing Step/Action Tables .....	3-H-3

#### Section I – Chapter Summary

Overview .....	3-I-1
Summary of Main Points .....	3-I-2
Exercise: Develop a Map for Your Proposal .....	3-I-4

### **Chapter 4 – Developing a Content Hierarchy**

Overview .....	4-1
Content Hierarchy .....	4-2
Example: Hierarchy of Blocks and Maps .....	4-4
Exercise: Determine the Content Hierarchy of Your Proposal .....	4-10
Summary .....	4-11

### **Chapter 5 – Making Content Accessible**

Overview .....	5-1
Overview Map .....	5-2
Example: Overview Map .....	5-3
Master Table of Contents .....	5-4
Example: Master Table of Contents .....	5-5
Executive Summary .....	5-6
Example: Executive Summary .....	5-7
Exercise: Develop an Overview Map or Executive Summary .....	5-8
Summary .....	5-9

---

*Continued on next page*

## Table of Contents , Continued

---

### **Chapter 6 – Phase 3: Editing and Polishing the Proposal**

Overview .....	6-1
Section A – Editing for Overall Impact	
Overview .....	6-A-1
Checking the Proposal’s Sequence and Completeness .....	6-A-2
Editing or Organization and Easy Access .....	6-A-3
Editing the Proposal for Visual Presentation .....	6-A-4
Section B – Editing for Persuasiveness	
Overview .....	6-B-2
Editing Labels to be More Persuasive .....	6-B-2
Ensuring Concise Wording .....	6-B-3
Reviewing the Proposal for Readability .....	6-B-5
Summary .....	6-B-7

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# Chapter 1

## Introduction

### Overview

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**Proposals and the sales cycle**

Proposals are almost always part of a larger sales cycle. Many different people and departments may be involved in that cycle. For example, sales representatives, technical or product experts, writers, and account executives may all be working on the same project, a part of which will be a written proposal to a customer.

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**Team approach**

Since proposal writing is often a team effort, the people involved should share common concepts and a common vocabulary to discuss and develop the proposal. To accomplish this, proposal writers need to use a proposal-writing method that ensures content completeness and consistency.

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**Information Mapping method**

The Information Mapping method is a structured approach to writing that can help proposal writers develop complete and consistent proposals. The method can be used to develop any type of business proposal, though the focus of this workshop will be on sales proposals.

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**In this chapter**

This chapter contains the following topics.

<b>Topic</b>	<b>See Page</b>
Proposal Types	1-2
Parts of a Standard Proposal	1-4
Exercise: Parts of a Standard Proposal	1-8
Challenges in Producing Successful Proposals	1-9
Three-Phase Proposal Development Process	1-10
Information Mapping Tools	1-11
Benefits of the Information Mapping Method	1-12
Summary	1-14

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# Proposal Types

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**Introduction** There are many different types of proposals. The type of proposal depends on the situation in which it is written and presented.

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**Proposal goal** The goal of any proposal is to make the sale or to move the proposing organization another step forward in the sales cycle.

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**Types** There are four common types of sales proposals:

- Standard proposal
  - Letter of Commitment
  - Response to Request for Proposal (RFP), and
  - Oral presentation.
- 

**Standard proposal** A standard proposal is a formal written document that explains the

- problem
- solution to the problem, and
- implementation of the solution.

A standard proposal is most appropriate when the proposal writer knows little information about the client or when there is no explicit RFP.

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**Letter of Commitment** A Letter of Commitment is a written document that confirms and clarifies an agreement already reached between the customer and the proposer. It is usually a follow-up to negotiations that have produced a verbal agreement. It should detail exactly what each party can expect as a result of doing business together.

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## Proposal Types , Continued

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### **Response to RFP**

A Response to an RFP is a formal, usually written document that is prepared and presented in accordance with the specific requirements and instructions contained in the RFP. The form and content of the Response to an RFP are sometimes dictated by the customer and may be clearly defined.

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### **Oral Presentation**

An Oral Presentation is a proposal delivered in person. An Oral Presentation is the:

- result of a written proposal, and
- the next step in the sales cycle.

*Note:* In some cases, particularly when there are few proposers, the Oral Presentation may take the place of the written document.

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### **Determining the type of proposal**

In order to determine the type of proposal to create, ask questions such as:

- How much do I know about the customer or client?
  - Have we done business with the customer in the past? If so, what have we learned from that experience?
  - Is there a formal RFP that dictates the form and content of our response?
  - Is there a prior agreement or an informal arrangement already in place for the type of proposal that should be presented?
-

# Parts of a Standard Proposal

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**Introduction** Despite the diversity of proposal types, there is some consistency in the types of information a proposal contains.

---

**Parts of a proposal** A standard proposal contains the following parts, not necessarily in this sequence:

- Understanding the Client's Need
  - Objectives and Scope
  - Approach
  - Deliverables
  - Benefits
  - Organization and Staffing
  - Timing and Cost, and
  - Qualifications.
- 

**Understanding the customer's needs** If the statement of the need is on-target, the client is more likely to give the rest of the proposal serious consideration. However, understanding a customer's need can be difficult when the customer

- does not know the real problem
  - recognizes the symptoms of the problem, but not the problem itself, and
  - describes the problem in vague or contradictory terms.
- 

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## Parts of a Standard Proposal, Continued

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### **Objectives and scope**

While objectives and scope are often combined in the same section of the proposal, they are very different, as the table below explains. Proposals should reflect these differences.

<b>Topic</b>	<b>Definition</b>	<b>Example</b>
Objectives	Tell the customer in clear and explicit terms what you will accomplish by providing your product or service.	We will determine the cause of the inventory shortage and provide suggestions for correcting it.
Scope	Set the boundaries for the accomplishment.	We will study the problem in the Dallas and New Orleans facilities, and restrict our observations to the manufacturing sections only. We will interview workers at level 06 and above.

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### **Approach**

Once the objectives and the scope are set, you then tell the client how you will accomplish the objectives. The approach section convinces the client that you are the best company for the job. You demonstrate your expertise and set yourself apart from the competition.

The approach section must be clear and complete enough to convince the customer. This can be challenging when

- the approach is complex or technical, but must be understood by a non-technical audience, and
- you fear that the client will “steal” your ideas about the solution, then not buy your product.

Writers should describe what they or their product will do, and how they will do it, without giving all the implementation details. Most clients do not expect such detail until later.

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## Parts of a Standard Proposal, Continued

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**Deliverables** Deliverables are the end products or physical results a client can expect from purchasing your product or service. The client may have a different idea about what they are to receive than you do. Therefore, identifying the deliverables in the proposal will help prevent problems and misunderstandings later.

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**Benefits** Surprisingly, research shows that one of the most common weaknesses in proposals is the lack of a benefits section. The benefits section answers the client's question, "Why should I hire you?" It describes the value to the client of buying your product or service. The benefits should address the client's needs, such as the need to:

- increase sales
  - improve efficiencies
  - save time and money, and
  - improve staff competencies.
- 

**Organization and staffing** Customers are usually more interested in what you can do for them rather than who will do it. However, the organization and staffing section can improve your credibility.

**Caution:** Many proposals contain "boilerplate" sections of staff biographies or organizational charts. However, it is important to show the client the specific talents of your staff that qualify them to do the client's particular job. The proposal should give the impression that the staffing is just right for the client's situation.

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**Timing and cost** Many proposal writers argue that cost is the critical element of the proposal. However, in many cases, readers are just as concerned about what they will receive and how they will benefit; they do not make decisions on the basis of cost alone. Therefore, it is best to place the estimated timing and cost section after the other sections.

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## Parts of a Standard Proposal, Continued

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**Qualifications** Many proposals include a section on company qualifications either in the proposal itself or an appendix. As a general rule, include this section if you have significant experience implementing what you propose. Prior successes, references, and recommendations are appropriate in this section.

Make sure this information is accurate, up to date, and consistent in format with the rest of the proposal. All of the materials must look like they come from the same company.

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**The sequence** There is no such thing as a standard proposal sequence. The needs of the client dictate which section goes where and whether or not to include certain sections.

*Example:* A company with extensive experience installing satellite communications systems would highlight and emphasize the qualifications section for a client seeking similar services. A less experienced company, without a long history of projects, might de-emphasize qualifications and focus on its unique approach or cost-savings.

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## Exercise: Parts of a Standard Proposal

**Instructions** The following statements are from different sections of a proposal. Read each statement, then write the name of the proposal section in which it is likely to appear. Your choices are:

- Understanding the Client’s Need
- Objectives and Scope
- Approach
- Deliverables
- Benefits
- Organization and Staffing
- Timing and Cost, and
- Qualifications.

Sample statement	Proposal section
We will limit the study to the effects of gamma rays on plastic material.	
Because of the recent decline in revenues, we understand that P.J. Moore Inc. must conduct a time/efficiency evaluation.	
We will isolate the causes of the shortage and propose ways to eliminate them.	
You will receive an Exam Booklet and a Practice Exam for each participant.	
Your organization can expect an increase in productivity within three months after your employees complete the training.	
Our organization has done work similar to that described in our proposal for: <ul style="list-style-type: none"> <li>• Fengler Corporation</li> <li>• AC &amp; P, Inc., and</li> <li>• Swift Associates.</li> </ul>	
First, we meet with the target audience. Second, we conduct a complete skills assessment. Third, we use computer analysis to evaluate “gaps” in present skills.	
Unfortunately, our initial conversation indicates that the issues you perceive as problems are symptoms of deeper, hidden problems that must be addressed.	
Phase 1 of the proposed project will take fifteen (15) working days and cost approximately three hundred thousand dollars (\$300,000).	
B.J. Jones, Director of Vocational Training, will be responsible for managing Phase 1 of the project.	

# Challenges in Producing Successful Proposals

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## Introduction

Challenges in producing successful proposals fall into two broad categories:

- challenges that customers face in reading the proposal, and
  - challenges that writers face in developing the proposal.
- 

## Customer challenges

Customers often face the challenges of

- finding main points in pages of dense text
- not having enough time to read, and
- not having enough expertise to understand technical information.

If customers experience any or all of these problems, they are likely to form a negative impression of the proposal.

---

## Writer challenges

Proposal writers often face the challenges of

- explaining complex or technical information
  - articulating the needs of the client
  - lacking information about the audience and purpose
  - addressing multiple audiences with different levels of expertise
  - organizing the information
  - working with a team in writing the proposal, and
  - creating consistent content.
- 

## Characteristics of successful proposals

Successful proposals are

- audience-focused
  - tailored, not “boilerplate”
  - organized and structured logically to help customers find what they need quickly
  - consistent in language, format, and presentation
  - easy to read and understand, and
  - complete.
-

# Three-Phase Proposal Development Process

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**Introduction** The three phases for writing winning proposals are:

- Phase 1: Prewriting
  - Phase 2: Developing the Content, and
  - Phase 3: Editing and Polishing the Draft.
- 

**Phases** The table below lists the tasks involved in completing the phases of the proposal development process.

<b>Phase</b>	<b>Definition</b>	<b>Tasks</b>
Prewriting	The planning and analysis you do before putting your fingers on the keyboard.	<ol style="list-style-type: none"><li>1. Analyze the audience</li><li>2. Determine a proposal strategy</li><li>3. Develop a content outline</li></ol>
Developing the Content	Analyzing and organizing the information, and presenting it in the most readable way for the audience.	<ol style="list-style-type: none"><li>4. Write the draft.</li></ol>
Editing and Polishing the Draft	Editing the proposal for strategy and presentation.	<ol style="list-style-type: none"><li>5. Edit for:<ul style="list-style-type: none"><li>• impact</li><li>• persuasiveness, and</li><li>• grammar and usage.</li></ul></li></ol>

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# Information Mapping Tools

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## Introduction

Information Mapping provides four tools to help writers complete the phases of the proposal development process:

- Research-Based Principles
  - New Units of Information
  - Information Types, and
  - Presentation Modes.
- 

## Tools

The table below lists the tools of the Information Mapping method.

<b>Tools of the Information Mapping Method</b>	
<b>Research-Based Principles:</b> <ul style="list-style-type: none"><li>• Chunking</li><li>• Relevance</li><li>• Labeling</li><li>• Consistency</li><li>• Integrated Graphics and Media</li><li>• Accessible Detail</li><li>• Hierarchy of Chunking and Labeling</li></ul>	<b>New Units of Information:</b> <ul style="list-style-type: none"><li>• Blocks</li><li>• Maps</li></ul>
<b>Information Types:</b> <ul style="list-style-type: none"><li>• Process</li><li>• Fact</li><li>• Concept</li><li>• Structure</li><li>• Principle</li><li>• Procedure</li></ul>	<b>Presentation Modes:</b> <ul style="list-style-type: none"><li>• text</li><li>• tables</li><li>• charts</li><li>• graphs</li><li>• illustrations</li></ul>

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# Benefits of the Information Mapping Method

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## **Introduction**

The Information Mapping method benefits the

- communicator
- audience, and
- organization.

These benefits are described below.

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## **Benefits for the communicator**

Using the Information Mapping method allows communicators to

- save time
  - make revisions more easily
  - improve the review process
  - simplify analysis
  - increase consistency, and
  - be more flexible when writing to multiple audiences.
- 

## **Benefits for the audience**

Audiences find that information that has been organized using the Information Mapping method

- is easy to use
  - is easy to scan
  - is clear
  - reduces errors
  - saves time, and
  - increases productivity.
- 

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## Benefits of the Information Mapping Method, Continued

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### **Benefits for the organization**

Companies and organizations using the Information Mapping method report significant advantages.

*Greater efficiency:* People trained in the method report at least a 10 percent improvement in their writing efficiency. Many report increases in writing productivity up to 30 percent.

*Better organization:* More than 95 percent of those trained in the Information Mapping method report they spend less time debating where and how to start projects.

*Improved analysis:* People using the method report a far more thorough analysis and a better understanding of their subject. Missing data and inconsistencies are easier to find.

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# Summary

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**Introduction** The information below summarizes the key points presented in this chapter.

---

**Parts of a proposal** A standard proposal contains the following parts, not necessarily in this sequence:

- Understanding the Client’s Need
  - Objectives and Scope
  - Approach
  - Deliverables
  - Benefits
  - Organization and Staffing
  - Timing and Cost, and
  - Qualifications.
- 

**Phases** The table below lists the tasks involved in completing the phases of the proposal development process.

<b>Phase</b>	<b>Definition</b>	<b>Tasks</b>
Prewriting	The planning and analysis you do before putting your fingers on the keyboard.	1. Analyze the audience 2. Determine a proposal strategy 3. Develop a content outline
Developing the Content	Analyzing and organizing the information, and presenting it in the most readable way for the audience.	4. Write the draft.
Editing and Polishing the Draft	Editing the proposal for strategy and presentation.	5. Edit for: <ul style="list-style-type: none"><li>• impact</li><li>• persuasiveness, and</li><li>• grammar and usage.</li></ul>

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## Summary, Continued

### Tools

The table below lists the tools of the Information Mapping method that will help you complete the proposal development process.

<b>Tools of the Information Mapping Method</b>	
<b>Research-Based Principles:</b> <ul style="list-style-type: none"><li>• Chunking</li><li>• Relevance</li><li>• Labeling</li><li>• Consistency</li><li>• Integrated Graphics and Media</li><li>• Accessible Detail</li><li>• Hierarchy of Chunking and Labeling</li></ul>	<b>New Units of Information:</b> <ul style="list-style-type: none"><li>• Blocks</li><li>• Maps</li></ul>
<b>Information Types:</b> <ul style="list-style-type: none"><li>• Process</li><li>• Fact</li><li>• Concept</li><li>• Structure</li><li>• Principle</li><li>• Procedure</li></ul>	<b>Presentation Modes:</b> <ul style="list-style-type: none"><li>• text</li><li>• tables</li><li>• charts</li><li>• graphs</li><li>• illustrations</li></ul>



# Sample Answer: Parts of a Standard Proposal

**Instructions** The following statements are from different sections of a proposal. Read each statement, then write the name of the proposal section in which it is likely to appear. Your choices are:

- Understanding the Customer’s Need
- Objectives and Scope
- Approach
- Deliverables
- Benefits
- Organization and Staffing
- Timing and Cost
- Qualifications

Sample statement	Proposal section
We will limit the study to the effects of gamma rays on plastic material.	Scope
Because of the recent decline in revenues, we understand that P.J. Moore Inc. must conduct a time/efficiency evaluation.	Understanding the Customer’s Need
We will isolate the causes of the shortage and propose ways to eliminate them.	Objectives
You will receive an Exam Booklet and a Practice Exam for each participant.	Deliverables (End products)
Your organization can expect an increase in productivity within three months after your employees complete the training.	Benefits
Our organization has done work similar to that described in our proposal for: <ul style="list-style-type: none"> <li>• Fengler Corporation</li> <li>• AC &amp; P, Inc., and</li> <li>• Swift Associates.</li> </ul>	Qualifications
First, we meet with the target audience. Second, we conduct a complete skills assessment. Third, we use computer analysis to evaluate “gaps” in present skills.	Approach
Unfortunately, our analysis indicates that the issues your perceive as problems are symptoms of deeper, hidden problems that must be addressed.	Understanding the Customer’s Need
Phase 1 of the proposed project will take fifteen (15) working days and cost approximately three hundred thousand dollars (\$300,000).	Timing and Cost
B.J. Jones, Director of Vocational Training, will be responsible for managing Phase 1 of the project.	Organization and Staffing



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