How to Write a Killer Proposal

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For many qualitative research consultants, writing a proposal is like going to the dentist: you would prefer to avoid it but sometimes it's necessary. If this reflects how you feel about proposal writing, perhaps this article will be beneficial. I will present some ideas that may change your attitude about writing them, as well as some specific tips on ways to improve your chances of success.

Attitude Is Everything.
Let me begin with a topic not often discussed: the "philosophy" of writing a proposal. In contrast to the usual negativity, I suggest that there is a proposal writing mentality and that it pays to develop one for yourself. Why not look at proposal writing as something more than just a tedious way of trying to win a project? The following are reasons for taking a more positive approach to this endeavor:

- You might win the project. This is the ultimate reason why proposals are written and we love being successful.
- It is part of doing business. While it may not be as much fun as sending out an invoice, it is an acquired skill that ultimately can prove to be very beneficial.
- Writing a proposal is not just about winning a specific project. It is also about advertising. Even an unsuccessful proposal can make a good impression.
- It can result in a project that is particularly interesting or exciting, especially when you have a creative or unique approach and the client accepts it.

Before You Begin
Regardless of the potential benefit of having a good attitude, we all want our proposals to win projects. In order to slant the odds more in your favor, there are a number of factors to be considered before you even begin writing. The key is to have a clear understanding of the situation you are in by trying to find answers to these important questions:

- How many research companies are writing proposals?
- Who is evaluating the proposal? Is it the client? Is it the client's client? Is it an individual or a group effort? Does the evaluator(s) have sufficient research experience to gauge the relative merits of the proposals?
- On what basis or criteria are the proposals being evaluated?
- Is the client just looking for the lowest price?
- How receptive is the client to new ideas and innovative methodologies?
- Do any of the research companies have an edge or advantage over the competition?

I would not hesitate to ask a potential client any of the above questions. An evaluation of these considerations will result in one of the following actions: you will decide not to write a proposal, thereby saving time and effort, or you will decide to write the proposal because you feel you have a good chance of winning. Two basic rules apply:

- The more you know about the project, upfront, the better.
- If there is absolutely nothing to gain, don't write.

Types of Proposals:

All proposals are not created equal. Indeed, there are different types of proposals for different situations and occasions. While there may be others and a few may overlap somewhat, these are my five "classic" types of proposals.

1. The "Price and Timing" Proposal: This one is very simple; it is basically a letter of confirmation. The client gives you all of the specs and simply wants to know how much you will charge and how long it will take to complete. Don't spend too much time on this one; a low price scores more points than a creative methodology.

2. The "I've Got A Great Idea" Proposal: I especially like this one because you get to do the job according to your own creative methodological input. (One example of this is the unsolicited or "cold" proposal.) Remember that it is not sufficient to simply state the idea, nor is it wise to assume the client will recognize its genius. Find a way to tell them without shame or false modesty how good it is and how smart you are for thinking of it.

3. The "This Project Is Mine" Proposal: I like this one too. It happens when your strengths and experiences are the perfect match for the project under consideration. You feel that the chances are very good that you will get the project because you may be the strongest competitor among those proposing. Sometimes it is not even necessary that you have a unique idea; the key will be emphasizing your assets as a researcher. Heavily sell your strengths as beneficial to the study objectives.

4. The "Let's Understand Each Other" Proposal: The client may be a small company with little research experience, or one that lacks insight as to what such a project might entail. In this situation you tell the client exactly what you intend to do and are very explicit about how it will be done. In addition, you are very careful to explain all possible contingencies and how they would be handled. I think of this as having the detail of a lawyer's contract. While some people may think it is a bad idea to spell out all of the contingencies (i.e., travel expenses, billing procedures, etc.) in a proposal, in certain situations I think it is good because it shows that you are thoughtful and experienced

5. The "I Don't Want This Project" Proposal: There are occasions when, for political or other reasons, it is beneficial to submit a proposal even though you do not want the job or you do not know or trust the client. At times like this I do not spend too much time on the proposal and I price the study at premium rates. This is the only situation where winning the project may not be a cause for serious rejoicing but at least you will be happy with the profit you can make.

And In Conclusion…:
As should be obvious from the above, developing the best methodological approach to a study is only part of what goes into a winning proposal. The other parts, sometimes ignored or under appreciated, are *emphasizing the benefits* of what you are proposing and *convincing the client* that you should be given top consideration for the project.

And the task is not over once the last sentence is written. Before you send it to the client, make it *look good*. Consider things such as fonts and spacing with a view toward attractiveness. If sending a hard copy, put it in a classy cover or folder. When appropriate, include a cover letter thanking the client for the opportunity to write the proposal (this is good PR). If the study is awarded to someone else, try to get feedback as to why the proposal was unsuccessful, remembering to keep a positive, non-defensive attitude. Incidentally, getting feedback is a good idea even when you win the project.

If any of the ideas in this article prove helpful, that's great. But if you ever find that you and I are writing a proposal for the same study, you might want to reconsider…I still have a trick or two that I haven't told you about. :-)

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Mr. Harris has been a speaker at various marketing conventions in the United States as well as Europe, Mexico, Central and South America. He also lectures and conducts seminars on a range of marketing and research topics and has been selected for inclusion in Ebony Magazine's "Most Successful Blacks."

A very experienced qualitative research consultant and focus group moderator, Bob is a founding member and past President of the Qualitative Research Consultants Association, and currently chairs the

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Bob has written many winning proposals and is willing to answer questions about writing them. He can be reached at 718-786-9640 or by email: [*jrobharris@cs.com*](mailto:jrobharris@cs.com)