

Writing in Organizations

Prepared by Dr. Adam Yagoub

Lecture 9

MGM 202

Writing Successful
Proposals



جامعة الجميع الذكية
EVERYONE'S SMART UNIVERSITY

Lecture 9

Lecture Outline

Lecture 1: Getting Started: Writing and Your Career.

Lecture 2: The Writing Process and Collaboration at Work.

Lecture 3: Writing Routine Business Correspondence.

Lecture 4: Writing Letters: Some Basics for Communicating with Audiences Worldwide.

Lecture 5: How to Get a Job: Searches, Dossiers, Portfolios, Résumés, Letters, and Interviews.

Lecture 6: Designing Successful Documents, Visuals, and Websites.

Lecture 7: Writing Instructions and Procedures.

Lecture 8: Writing Effective Short Reports.

Lecture 9: Writing Proposals.

Lecture 10: Writing Careful Long Reports.

- 1- Writing Successful Proposals.**
- 2- Internal Proposals.**
- 3- Sales Proposals.**
- 4- Short Reports and Proposals: Some Final Words.**



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Writing Successful Proposals

1- Writing Successful Proposals:

A proposal is a detailed plan of action submitted to a reader or group of readers for approval. The readers are usually in a position of authority—supervisors, managers, department heads, company buyers, boards of private foundations, elected officials, military or civic leaders—to endorse or reject the plan. Your proposal must convince these readers that your plan will help them improve their business, save them money, enhance their image, improve customer satisfaction, make the environment safer, or all of these.

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Proposals are written for many purposes and many different audiences. You can write an internal proposal, for example, to your boss, seeking authorization to hire staff, change a procedure, or purchase a new piece of equipment. Or you can write a sales proposal to potential customers, offering a product or a service (such as providing training with new, special firefighting gear or selling an office manager a line of ergonomically designed furniture).

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Depending on the job, proposals can vary greatly in size and in scope. A formal proposal can be a very long and complex document running into hundreds of pages. A proposal to your employer, however, about redesigning the company website could easily be conveyed in a few pages, the length of a short report. To propose doing a small job for a prospective client—for example, redecorating a waiting room in an accountant's office—a letter with information on costs, materials, and a timetable might suffice.

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- Proposals Are Persuasive Plans

Proposals, whether large or small, must be highly persuasive to succeed. Without your audience's approval, your plan will never go into effect, however accurate and important you think it is. Your enthusiasm is not enough to persuade readers; you have to supply hard evidence. Your proposals must convince readers that your plan is relevant, practical, based upon careful research, and designed to benefit the reader and his or her company.

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- Proposals Frequently Are Collaborative Efforts

Like many other examples of business and technical writing, proposals often are the product of teamwork. Even a short in-house proposal is often researched and put together by more than one individual in the company or agency, as Figure 8.8 illustrates.

Many times, individual employees will pull together information from their separate areas (such as graphics and design, finance, marketing, technology, transportation, and even legal) and put it into a proposal that each member of the team then reads and revises until the team agrees that the document is ready to be released.

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- Guidelines for Writing a Successful Proposal

The following guidelines will help you to persuade your audience to approve your plan. Refer to these guidelines both before and while you formulate your plan.

1. Approach writing a proposal as a problem-solving activity.
2. Regard your audience as skeptical.
3. Research your proposal topic thoroughly.

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4. Scout out what your competitors are doing.
5. Prove that your proposal is workable.
6. Be sure your proposal is financially realistic.
7. Package your proposal attractively.

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2- Internal Proposals:

The primary purpose of an internal proposal, such as the one shown in Figure 8.8, is to offer a realistic and constructive plan to help your company run its business more efficiently and economically.

Figure 8.8 An internal unsolicited proposal.



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MONROE
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LANGSTON
508-796-3009

TO: Michael L. Sappington, Executive Vice President
Dorothy Woo, Langston Regional Manager

FROM: Tina Escobar, Oliver Jabur, ATM Services

DATE: June 10, 2011

RE: A proposal to install an additional ATM at the Mayfield Park branch within the next 60-90 days

PURPOSE

We propose a cost-effective solution to what is a growing problem at the Mayfield Park branch in Langston: inefficient servicing of customer needs and rising personnel costs. We recommend that you approve the purchase and installation, within the next two to three months, of another ATM at Mayfield. Such action is consistent with Community's goals of expanding branch banking services and promoting our image as a self-serve yet customer-oriented institution.

THE PROBLEM WITH CURRENT SERVICES AT MAYFIELD PARK

Currently, we employ four tellers at Mayfield. But too much is being spent on personnel/salary for routine customer transactions. In fact, as determined by teller activity reports, nearly 25 percent of the four tellers' time each week is devoted to routine activities easily accommodated by the installation of another ATM. Outlined in the table below is a breakdown of teller activity for the month of May:

Teller #	Total Transactions	Routine Transactions
1	6,205	1,551
2	5,989	1,383
3	6,345	1,522
4	6,072	1,518
	24,611	5,974

Clearly states
why proposal
is being sent

Takes into
account
organization's
mission

Identifies
problem by
giving reader
essential
background
information
based on
research

Provides easy-
to-read table

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(Continued) Figure 8.8

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Clearly, we are not taking advantage of our tellers' sales abilities when they are kept busy with routine activities. To compound the problem, we expect business to increase by at least 25 percent at Mayfield in the next few months, as projected by this year's market survey. If we do not install an additional ATM, we will need to hire a fifth teller, at an annual cost of \$29,900 (\$23,000 base pay plus approximately 30 percent for fringes), for the additional 6,000 transactions we project.

Most important, though, customer needs are not being met efficiently at Mayfield. Recent surveys done for Community Federal by Watson-Perry, Inc. demonstrate that our customers are inconvenienced by not having one more ATM at Mayfield. They are unhappy about long waits both at the ATMs and at the teller windows to do simple banking business, such as deposits, withdrawals, and loan payments. Several discussions we had with manager Rachael Harris-Koyoto at the Mayfield branch confirm customers' complaints.

Ultimately, the lack of another ATM at Mayfield Park hurts Community's image. With plentiful ATMs available to Mayfield residents at local stores and at other banks, our institution risks having customers and potential customers go elsewhere for their banking needs. We not only miss the opportunity of selling them our other services but also risk losing their business entirely.

A SOLUTION TO THE PROBLEM

Purchasing and installing an additional ATM at Mayfield Park will result in significant savings in personnel costs and time. Specifically, we can

- Save money by not having to hire a fifth teller
- Allocate teller duties more efficiently and productively by assisting customers with questions and transactions not handled through an ATM, such as opening a new account; purchasing savings bonds, CDs, and international currency; and providing Internet banking
- Increase time for tellers to cross-sell our services, including our line of nontraditional banking products—annuities, mutual funds, debit cards, and global market accounts

Divides problem into parts—volume, financial, personnel, customer service

Emphasizes the expense if nothing is done

Cites important research

Verifies that problem is widespread

Emphasizes possible future problems

Relates solution to individual parts of the problem

Bulleted list makes recommendations easy to follow

Figure 8.8 (Continued)

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- Service customer retirement options by having tellers track IRAs, 401(k)s, 403(b)s, and Roth IRA's
- Improve customer satisfaction by giving them the option of meeting their banking needs electronically or through a teller
- Ease the stress on tellers at Mayfield Park

It is feasible to install another ATM at Mayfield. This location does not pose the difficulties as at some of our older branches. Mayfield offers ample room to install a drive-up ATM in the stubbed-out fourth drive-up lane. It is away from the heavily congested area in front of the bank, yet it is easily accessible from the main driveway and the side drive facing Commonwealth Avenue, as the photograph below shows.



Photo courtesy Taylor Wilson

Judging from our previous experiences, the ATM could be installed and operational within one to two months. Moreover, by authorizing the expenditure at Mayfield within the next month, you will ensure that additional ATM service is available long before the busy Christmas season.

COSTS

The costs of implementing our proposal are as follows:

Diebold drive-up ATM	\$28,000.00
Installation fee	2,000.00
Maintenance (1 year)	1,500.00
	\$31,500.00

Shows problem can be solved and stresses how

Photo shows location has room for additional ATM

Documents that work can be done on time and highlights advantage of doing it now

Itemizes costs

(Continued)

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(Continued)

Figure 8.8

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This \$31,500, however, does not truly reflect our annual costs. We would be able to amortize, for tax purposes, the cost of the installation of the ATM over five years. Our annual expenses would, therefore, would actually be

$$\begin{array}{r} \$30,000 (28,000 + 2,000) / 5 \text{ years} = \$6,000 \text{ per year} \\ + \$1,500 \text{ (maintenance)} \\ \hline \$7,500 \text{ per year} \end{array}$$

Compared with the \$29,900 a year the bank would have to expend for a fifth teller position at Mayfield, the annual depreciated cost for the ATM (\$7,500) in fact reduces by almost 75 percent (\$22,400) the amount of money the bank will have to spend every year for much more efficient customer service.

CONCLUSION

Authorizing another ATM for the Mayfield Park branch is both feasible and cost effective. Endorsement of this proposal will save our bank more than \$22,400 in teller services annually, decrease customer complaints, and increase customer satisfaction and approval. We will be happy to discuss this proposal with you anytime at your convenience, and answer any questions you may have.

Thank you for considering our plan.

*Interprets costs
for reader*

*Proves change
is cost-effective,
citing specific
financial
evidence*

*Ends by
stressing
benefits for
reader and
bank as a
whole*

*Ends by
thanking
reader*

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On your job you may discover a better way of doing something or a more efficient way to correct a problem. You believe that your proposed change will save your employer time, money, or further trouble.

Regardless of who identifies the problem, your proposal, generally speaking, will be an informal, in-house message. A brief (one to three-page) memo, as in Figure 8.8, or even a shorter e-mail, should be appropriate.

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- Some Common Topics for Internal Proposals

An internal proposal can be written about a variety of topics, including the following:

- purchasing new or more advanced equipment to replace obsolete or inefficient computers, appliances, vehicles, and the like, or upgrading equipment technology
- obtaining document security software and offering training sessions to show employees how to use it
- recruiting new employees or retraining current ones on a new technique or process

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- eliminating a dangerous condition or reducing an environmental risk to prevent accidents—for employees, customers, or the community at large
- cutting costs—for services, transportation, advertising, etc.
- improving technology/communication within or between departments of a company or agency
- expanding work space or making it greener, more private, ergonomically beneficial to employees, or more inviting to customers

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- Following the Proper Chain of Command

Writing an internal proposal requires you to be sensitive to office politics. It may be wise first to meet with your boss to see if she or he has already identified the problem or has specific suggestions on how to solve it. If given the go-ahead, then you and your team can provide your boss with a draft and ask for revisions or feedback.

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- Ethically Identifying and Resolving Readers' Problems

When you prepare an internal proposal, do not lose sight of the ethical obligations you have and the ways to meet them. **Here are three important guidelines:**

1. Consider the implications of your plan company-wide. The change you propose (transfers, new schedules or technology, new hires) may have sweeping and potentially disruptive implications in another division of your company.

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2. Keep in mind what impact your change may have for co-workers from cultural traditions other than your own. In addition to speaking with your boss, it would be wise, maybe even mandatory, to consult your human resources director.
3. Never submit an internal proposal that offers an idea that you think will work but relies on someone else to supply the specific details on how and when it will work.

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- Organizing Internal Proposals

A short internal proposal can follow a relatively straightforward plan of organization, from identifying the problem to solving it. Internal proposals usually contain four parts, as shown in Figure 8.8: **purpose**, **problem**, **solution**, and **conclusion**. Refer to this figure as you read the following discussion.

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A - The Purpose

Begin your proposal with a brief statement of why you are writing to your supervisor: “I propose that . . .” State right away why you think a specific change is necessary now. Then, succinctly define the problem and emphasize that your plan, if approved by the reader, will solve that problem.

B - The Problem

Prove that a problem exists. Document its importance for your boss and your company; as a matter of fact, the more you show, with concrete evidence, how the problem affects the boss’s work (and area of supervision), the more likely you are to persuade him or her to act.

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- Here are some guidelines for documenting a problem.
 - Avoid vague (and unsupported) generalizations.
 - Provide quantifiable details about the problem.
 - Indicate how many employees (or work hours) are involved or how many customers are inconvenienced or endangered by a procedure or condition.
 - Verify how widespread a problem is or how frequently it occurs by citing specific occasions.
 - Relate the problem to an organization's image, corporate mission, or influence (where appropriate).

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C - The Solution or Plan

In this section describe how you will make the change you propose and want approved, and then demonstrate the likelihood of its success. Your reader will again expect to find factual evidence. Be specific. Supply details that answer the following questions: (1) Is the plan workable, is it feasible—can it be accomplished here in our office, plant, or region? (2) Is it cost-effective—will it really save us money in the long run and not lead to even greater expenses?

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To get the reader to say “Yes” to these questions, provide the factual evidence you have gathered as a result of your research. For example, if you propose that your firm buy a new piece of equipment, do the necessary homework to locate the most efficient and cost-effective model available.

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- Supply the dealer's name, the costs, installation time, types of necessary service and training contracts, and warranties.
- Describe how your firm could use the equipment to obtain better or quicker results in the future.
- Document specific tasks the new equipment can perform more efficiently and economically than the models or types you use now

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D - The Conclusion

Your conclusion should be short—a paragraph or two at the most. Remind readers that (a) the problem is ongoing and serious, (b) the reason for change is justified and will benefit your organization, and (c) action needs to be taken and by a specified time. Re-emphasize the most important advantages.

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3- Sales Proposals:

A sales proposal is the most common type of proposal. Its purpose is to sell your company's products or services for a set fee. The firm or organization you want to sell your product or services to will issue a request for proposals or bids specifying exactly what it wants done and when, and it will expect you to stay within a clearly defined budget. A short sales proposal is a marketing tool that includes a sales pitch as well as a detailed description of the work you propose to do. Figure 8.9 contains a sales proposal in response to a company's request.

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A proposal in response to a request from a company. Figure 8.9



Reynolds Interiors • 250 Commerce Avenue S.W. • Portland, OR 97204-2129

January 21, 2011

Mr. Floyd Tompkins, Manager
General Appliances
Highway 11 South
Portland, OR 97222-1300

Dear Mr. Tompkins:

In response to your request listed on your website for bids for an appropriate floor covering at your new showroom, Reynolds Interiors is pleased to submit the following proposal to meet your specific needs. We appreciated the opportunity to visit your showroom on January 14 in order to submit this proposal.

After carefully reviewing your specifications for a floor covering and inspecting your new facility, we believe that **Armstrong Classic Corlon 900** is the most suitable choice. We are enclosing a few samples of the **Corlon 900** so you can see how carefully they are constructed.

Corlon's Advantages

Guaranteed against defects for a full three years, **Corlon** is one of the finest and most durable floor coverings manufactured by Armstrong. It is a heavy-duty commercial floor 0.085-inch thick for protection. Twenty-five percent of the material consists of interface backing; the other 75 percent is an inlaid wear layer that offers exceptionally high resistance to the heavy, everyday traffic your showroom will see. Traffic tests conducted by the independent Floor Covering Institute have repeatedly proved the superiority of **Corlon's** construction and resistance. You might want to visit the Institute's website (www.fci.org) for a demonstration of how durable and versatile Classic **Corlon** flooring is.

<http://www.reynolds.com> • 503-555-8733 • Fax: 503-555-1629

Begins with a reference to company's request for bids

Identifies best solution

Describes product's features that will benefit reader

Helpfully refers to an independent source to corroborate the benefits of the product

Distinguishes seller's product from competitors'

Figure 8.9 (Continued)

Gives another advantage over competitors' models

Explains how job is done professionally

Gives realistic timetable

Itemizes all costs based on research of market conditions and reader's bid

2

Another important feature of **Corlon** is the size of its rolls. Unlike other leading brands of similar commercial flooring—Remington or Treadmaster—**Corlon** comes in 12-foot-wide rather than 6-foot-wide rolls. This extra width will significantly reduce the number of seams on your floor, thus increasing its attractiveness and eliminating the dangers of splitting.

Installation Procedures

The **Classic Corlon 900** requires that we use the inlaid seaming process, a technical procedure requiring the services of a trained floor mechanic. Herman Goshen, our chief floor mechanic, has more than eighteen years of experience working with the inlaid seam process. His professional work and keen sense of layout and design have been consistently praised by our customers.

Installation Schedule

We can install the **Classic Corlon 900** on your showroom floor during the first week of March, which fits the timetable specified in your request. The material will take three and one-half days to install but will be ready to walk on immediately. Be assured that your floor will be installed no later than March 7th. We recommend, though, that you not move heavy equipment onto the floor for 24 hours after installation.

Costs

The following costs include the **Classic Corlon** tile, labor, and tax:

750 sq. yards of Classic Corlon at \$23.50/sq. yd.	\$ 17,625.00
Labor (28 hrs @ \$18.00/hr.)	\$ 504.00
Sealing fluid (10 gals. @ \$15.00/gal.)	\$ 150.00
Total	\$ 18,279.00
Sales tax (5 percent)	\$ 913.95
GRAND TOTAL	\$ 19,192.95

(Continued)

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(Continued)

Figure 8.9

3

Our costs are at least \$300.00 under those you specified in your bid.

Reynolds's Qualifications

Reynolds Interiors has been in business for more than 28 years. In that time, we have installed more than 2,500 commercial floors in Portland and its suburbs. In the last year, we have served more than 60 customers, including the new multipurpose Tech Mart facility in downtown Portland. Our floor designs have also been included in several commercial properties that have won awards from the Portland Architectural Review Board. Reynolds has also consistently received high commendations from our many satisfied customers, and we would be happy to furnish you with a list of our references.

Conclusion

Thank you for the opportunity to submit this proposal to General Appliances. We are confident that you will be pleased with the appearance and durability of an Armstrong Classic Corlon 900 floor and our installation of it. If we can provide you with any further information about our service or Corlon flooring, please call us at 503-555-8733 or visit us at our website.

Sincerely yours,

Neelow Singh

Neelow Singh
Sales Manager

Jack Rosen

Jack Rosen
Installation Supervisor

*Points out
proposal
comes in under
budget—
always a major
consideration
for buyer*

*Establishes
history of
service and
provides
documented
evidence of
quality work*

*Encourages
reader to
accept*

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- Knowing Your Audience and Meeting Its Needs

Your audience will usually be one or more executives who have the power to approve or reject a proposal. Unlike readers of an internal proposal, your audience for a sales proposal may be even more skeptical since they may not know you or your work. **You can increase your chances of success by trying to anticipate their questions such as:**

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- Does the writer's firm understand our problem?
- Can the writer's firm deliver the services it promises?
- Can the job be completed on time?
- Is the budget reasonable and realistic (neither inflated nor too low)?
- What assurances does the writer offer that the job will be done exactly as proposed?
- What are the qualifications the writer's firm has to get the job done?
- How has the writer demonstrated his or her trustworthiness?

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- Organizing Sales Proposals

Most sales proposals include the following elements: introduction, description of the proposed product or service, timetable, costs, qualifications of your company, and conclusion.

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A - Introduction

The introduction to your sales proposal can be a single paragraph in a short sales proposal or several pages in a more complex one. Basically, your introduction should persuasively prepare readers for everything that follows in your proposal. **The introduction itself may contain the following sections**, which sometimes may be combined.

1. Statement of purpose and subject of proposal.
2. Background of the problem you propose to solve.

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B - Description of the Proposed Product or Service

This section is the heart of your proposal. Before spending their money, customers will demand hard, factual evidence of what you claim can and should be done. **Here are some points that your proposal should cover.**

1. Carefully show potential customers that your product or service is right for them.
2. Describe your work in suitable detail.
3. Stress any special features, maintenance advantages, warranties, or service benefits.

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C - Timetable

A carefully planned timetable assures readers that you know your job and that you can accomplish it in the deadline set forth in the call for proposals or bids. Your dates should match any listed in a company's proposal request.

Provide specific dates to indicate

- when the work will begin
- how the work will be divided into phases or stages
- when you will be finished
- whether any follow-up visits or services are involved

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D - Costs

Make your budget accurate, complete, and convincing. But give customers more than merely the bottom-line cost. Show exactly what readers are getting for their money so that they can determine if everything they need is included. **Itemize costs for**

- specific services
- equipment and materials
 - labor (by the hour or by the job)
- transportation
- travel
- training

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E - Qualifications of Your Company

Emphasize your company's accomplishments and expertise in providing similar services and/or equipment. Mention the names of a few local firms for whom you have worked that would be able to recommend you and cite any awards or commendations.

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F - Conclusion of Proposal

This is the “call to action” section of your sales proposal. Encourage your reader to approve your plan by stressing major benefits of your plan. Offer to answer any questions the reader may have. Some proposals end by asking readers to sign and return a copy of the proposal indicating their acceptance.

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4- Short Reports and Proposals: Some Final Words:

To prepare successful short reports and winning proposals, always remember your reader's needs, document your information, and write objectively, persuasively, and ethically.

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References:

Successful Writing at Work, Concise
Third Edition,

By: Philip C. Kolin

University of Southern Mississippi

Chapter 8

