

TEAMING III: Tips & Tricks to a Cohesive Proposal

Notes:

7 attendees.

Below is our “agenda” with discussion notes for each topic.

Things to remember

In the sales process, the written proposal is the vehicle that carries the terms of an agreement between buyer and seller, and forms the basis for a subsequent business contract. When a proposed offer is accepted by the buyer, it creates a legally binding document for both parties. Should include input from financial, legal and advertising departments.

Remember our Brown Bag Session of a few months ago with an insurance representative covering topics such as:

- *Words to use*
- *Words not to use*
- *Legal ratifications of proposals.*

Setting up your materials for success

Types of forms:

- ❖ SF254 / SF255
- ❖ SF330
- ❖ AE 1-6
- ❖ Generic (open)
- ❖

Most took the time to reformat subconsultants materials to look cohesive. They also took the time to try and make their materials as user friendly as possible when they are the sub.

Resources and products for SOQ/proposal production and popularity of that software

- ❖ desktop publishing software
 - MS Word – *most popular but meet with lots of grumbles from MC’s. Pro for this software is that most anyone is a proficient user and requests for electronic submittals are most often in MSWord. Con of this software is that it isn’t meant to use a design (things move for no reason) and that anyone can get it there and tamper with the document.*
 - InDesign – *Love it! But firms have little experience with it outside marketing department making it hard for any others to support efforts.*
 - Adobe form maker – *did not discuss.*
- ❖ Printing and binding options – *3 ring binder, GBC and coil bind.*

MEETING MINUTES

The New Century Affiliate September Brown Bag Session took place at the SFCS office in Roanoke, Virginia. We had a total of 7 attendees from Lynchburg, Roanoke and Blacksburg locations. *For this session, we video-conferenced with the Hampton Roads group for a larger discussion.* I provided a handout with topic ideas, including in 3 categories: graphics, voice and strategy. Additional topics were brought up and discussed.

Some items discussed follow:

- How large of a team is too large? We discussed this question with regards to project type, project size, project importance, reasonable proposal submittal, etc.
- Should the cover letter only be 1-page as suggested? This was discussed and most agreed that a 2-page or larger cover letter is often preferred and used.
- We talked about how we are seeing some requests for proposals electronically. An option when sending a pdf file of your proposal is to lock the pdf for printing only.
- One template for the entire team/submittal? Most agreed that putting the sub-consultants information into the prime's template is the best way to go, time dependent. Be sure to include logos and sub-consultants name so it is clear who the resume/profile belongs to.
- How important are debriefings? It was mentioned that debriefings are definitely worth the time to see what others are submitting and how your firm compares. Make a meeting soon after award is made, if you won or if you lost.
- So what? We talked about how information in your proposal needs to answer this question throughout.
- Should you ask your sub-consultants to be exclusive? Most agreed that they almost never ask a sub to go exclusive, only in rare circumstances, though it may be tough for the sub to agree.
- What information to use from subs? We talked about how you should select projects where the prime and sub have worked together to show a relationship. If this is not possible, select projects that best match what you are pursuing.
- How do you organize proposal creation internally? Most offices delegates pieces to different staff members and have 1 person responsible for the final product. An editor needs to be in place to check the voice and misspellings throughout the proposal.

Discussions such as these can always benefit marketing coordinators in their day-to-day activities. It is beneficial to know how successful companies operate and much can be learned. Some topics for discussion may be something you just haven't thought about but can really benefit the quality of your work.

Submittal packages

- ❖ Currently
 - Paper copy – *trends include double-siding and using recycled paper.*
 - w/ or without CD – *when including CD documents most often have to be in Word. Preferred way is PDF.*
- ❖ Trends
 - Electronically – *very few ever submitted electrically. Some feel its just one more thing to go wrong.*

Brief discussion was had about Shortlist

- ❖ Role of MC in shortlist – *experience at the table varied from no involvement, to creation of PPT, rehearsal support, set-up at presentation to presenting at presentation.*
- ❖ Presentation software – *PowerPoint is boring and predictable but decision makers prefer it.*
- ❖ Visual aids for use in presentations – *leave behinds (when to distribute, what to distribute).*
- ❖ Procedures for a post-presentation or post-contract award debriefing – *did not discuss.*