



# How to write a business proposal in six easy steps

A business proposal presents your goods or services to prospective clients. Strong business proposals include an executive summary, details of your offer, your experience. Most importantly, strong proposals focus on what's in it for your prospective client. But how to write a proposal? Here are six easy steps to follow.

## 1. Source the background information you need

Some business proposals are requested (solicited) while others are sent on spec (unsolicited). Ideally, you don't want to be pitching for business as an unknown. It's best if your business proposal comes after you've met with the key decision makers so that you can understand their requirements, and so they can put a face to a name. If possible, find out:

- Who will be making decisions and what their approval processes are
- Whether there is a deadline for your business proposal
- The budget for the project, so you know whether the proposal is worth your while
- What struggles the prospect has that your offer can address
- How much you'll need to charge to cover your costs in labour and materials.

The more that you can find out about the client, the greater your chances of writing a targeted, persuasive business proposal that secures you new business.

Don't forget online research either – website, annual report and media releases are all good sources of intelligence.

## 2. Define your value proposition and offer

Your proposal needs to address your potential client's wants, needs and pain points.

Once you know what these are, having discussed them at your meeting, it's important to think through how you will meet these needs. Tailor your value proposition to the needs and use hard evidence for what you've achieved for other clients. State this upfront in your business proposal, either in your introduction or executive summary.

This will keep your proposal focused on what your business can offer the prospect. Think through the following questions to identify what to focus on:

- What is your prospective client looking for?
- What are you going to offer to address those needs?
- What evidence can you present to demonstrate that you've addressed such needs before? Make sure the evidence is measurable

## 3. Focus on how the prospect will win by choosing you.

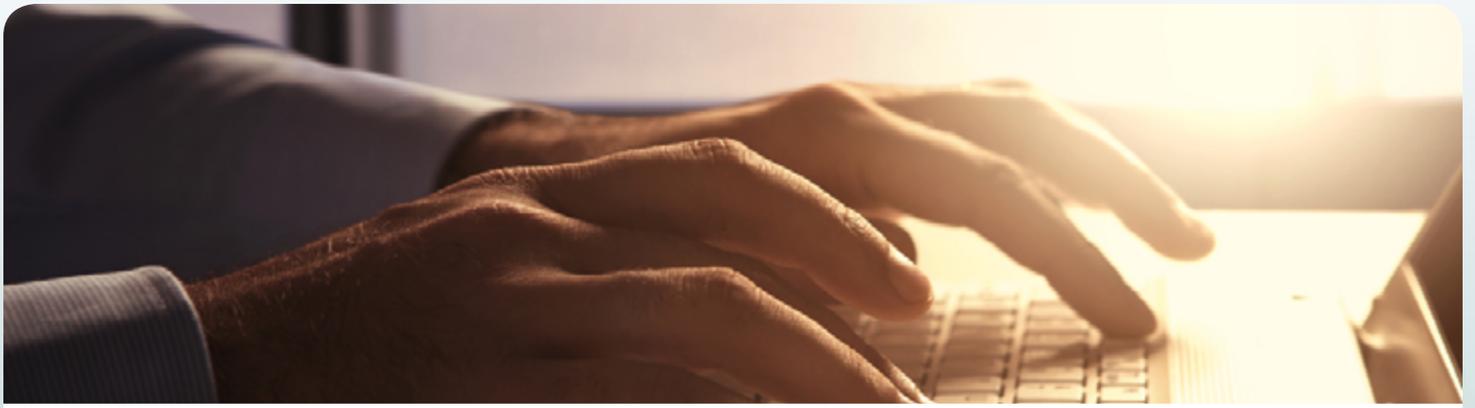
When writing your proposal, always make it benefit-focused, i.e. explain what the customer will gain from doing business with you. An effective business proposal is tailored to the needs of the prospective client; this means the offer and its value-add for the client is very clearly spelled out. A common trap is

to just write about your company, leaving the prospect to work out for themselves how your business may benefit them.

In your business proposal, you'll need to fully scope out your offer, covering off:

- Why the client should select you – your executive summary. This is where you sum up the key outcomes or benefits the prospect will gain by choosing you.
- What you're proposing to do – that is, the services you're going to deliver. You may also need to explain where the work will be done
- The process or steps that will be followed – that is, how you will deliver and how your process is fool-proof. This is your methodology
- How the contract will be resourced and managed – who will do the work and who will oversee it
- Quality and risk management – detail how you give complete assurance through your control quality and your risk management measures
- Your experience to show how you've done this before with referee details
- The price schedule, specifying when payment is due

Writing this out in your business proposal will help you thoroughly think through your offer and will enable you to confirm you have everything in place to undertake the work.



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## 4. Draft your business proposal

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An effective business proposal includes several key elements, as follows:

### Table of contents

Consider including a table of contents to help the reader navigate the different components of your offer. In general, though, it's best to keep your business proposal succinct. Typically, the longer these documents are, the more repetitive they become and the less likely they are to successfully engage your prospect.

### Executive summary

This should be your offer in a nutshell. It should contain all the key points of your business proposal, highlighting the headline messages you want the prospect to remember. It's worthwhile using this section to reiterate the clients' requirements, showing that you understand their needs and that your proposal directly addresses them. It's absolutely essential to sum up the value you will bring and give evidence for how you've delivered value for other clients.

### Your services

This is where you outline the specifics of what you're proposing to provide. You can describe your services, their value, and the results clients gain. Include tangible examples. For example, explain how your clients save money or time by using your services, and say how much they save in monetary terms or percentages.

Describe any accolades your services have received, such as award wins or good reviews.

### Your methodology

Highlight the process, or stages, through which you deliver your services. Illustrate this, too, with a graphic.

It's a good idea to use charts to add colour and interest to the page, while also communicating

key information effectively. Similarly, tables can be a good way of plotting out your methodology and presenting information in a clear and easy to understand format.

### How you will resource and manage the service

Here you can describe your key team members. Unless you've been asked to provide full CVs, which you may be able to include as an appendix, keep the profiles brief. Most likely, you'll only need a few paragraphs on each team member. Include a photo of each, and ideally a team photograph, too. It will remind the client of who you are, helping to put a face to a name.

Identify the role each person will have, including the lead manager or contract or account manager for the prospect client.

Mention each person's qualifications, if relevant, and any accolades they've received, plus their key clients. If you have a testimonial for each team member from their happy customers, include those too.

If you don't have a testimonial for each person, it's not a problem. Scatter testimonials throughout the document. Alternatively, include a page of testimonials as an appendix, but remember that your prospect may not read the appendices.

### Quality and risk management

Detail how you control quality and your risk management measures. You may like to illustrate these two important features with a diagram or chart showing your processes for managing quality and risk. Include mention of your quality and risk management policies and any accreditations, such as ISO.

### Experience

Your prospect will want to know who you've worked with in the past. You can describe this in a number of ways:

- Mini case studies setting out the client's issue, your solution and the results
- List of clients with very brief description of the results you delivered
- Client logos

Also include contact details for three referees.

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## 5. Appendix

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You may have been asked to include additional information such as team CVs or a draft contract. Or you may choose to include a page of customer testimonials, and historical or projected data relevant to your service. Content that is not crucial to the main document can be included in the appendices. But bear in mind that the prospect may not read any of the appendices.

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## 6. What's next?

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When everything is drafted, make sure the document is carefully proofread. This should ideally be done by someone who has a fresh perspective so will notice any problem areas, such as errors, inconsistencies or unnecessary repetition.

Likewise, they may pick up problems with language, such as industry jargon or unsubstantiated claims. Someone else's point of view is always worthwhile – particularly if they have feedback – and will help you deliver a stronger, more effective business proposal.

When you have submitted the business proposal, either via email or an online portal, it's always good to follow up with the client showing your commitment and making yourself available to answer any questions they may have.

