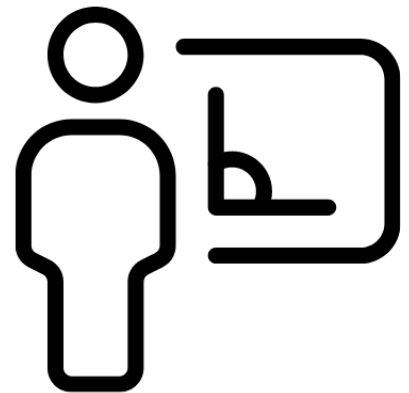


Instructors Guide



On the following pages is a sample module from our Instructor Guide. It provides the instructor with a copy of the material and a Lesson Plans box.

The key benefit for the trainer is the Lesson Plan box. It provides a standardized set of tools to assist the instructor for each lesson. The Lesson Plan box gives an estimated time to complete the lesson, any materials that are needed for the lesson, recommended activities, and additional points to assist in delivering the lessons such as Stories to Share and Delivery Tips.



*I don't pretend we have all the answers.
But the questions are certainly worth
thinking about.*

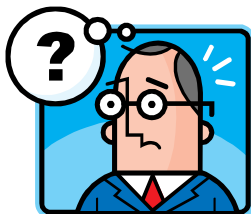
Arthur C. Clarke

Module Two: Understanding Proposals



Proposals are a very unique type of business document. In this module, we will explore the proposal writing process, as well as the most common types of proposals. Note that we only provide an overview of the four major types; there are many variations on these types, as well as more specialized categories.

What is a Proposal?



A proposal is primarily a sales pitch for a product or service that your company offers. It outlines a problem or opportunity that the client has and presents a product or service as a solution.

Proposals can be directed externally (to another organization) or internally (for example, to senior management, in order to gain support for a project or idea). In this course, we will focus on external proposals, but the principles can also be applied to internal proposals.

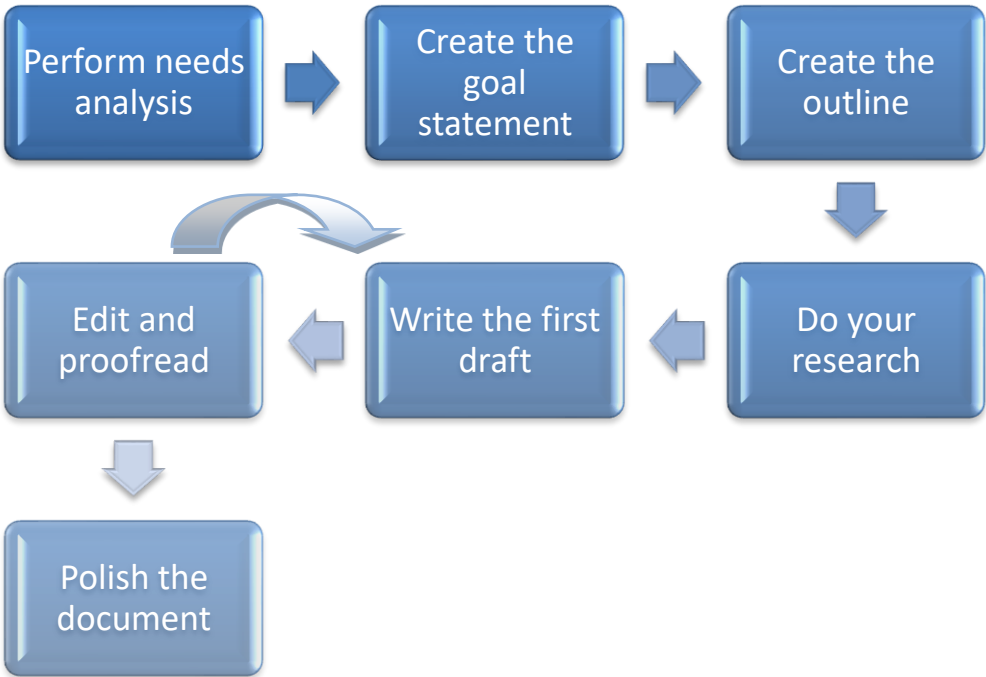
Proposals can also be solicited or unsolicited. Solicited proposals are written in response to a Request for Proposal (RFP) or Invitation for Proposal (IFP). Unsolicited proposals are those that the organization sends on its own in an attempt to gain new business.

Estimated Time	10 minutes
Topic Objective	To understand what a proposal is.

Topic Summary	A proposal is primarily a sales pitch for a product or service that your company offers. It outlines a problem or opportunity that the client has and presents a product or service as a solution. Proposals can be internal or external, and solicited or unsolicited.
Materials Required	None
Recommended Activity	In a large group, discuss how participants encounter proposals in their job.
Stories to Share	Each type of proposal has advantages and disadvantages. Encourage the group to identify some in their discussions.
Delivery Tips	It is important to perform this activity with group as a whole so that you can assess their needs.
Review Questions	What document initiates a solicited proposal? (Answer: RFP or IFP)

The Proposal Writing Process

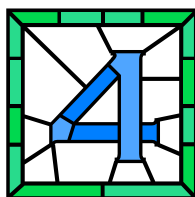
The proposal writing process has seven major steps.



As we have indicated above, the writing and editing process is often repeated several times. We will work through the entire process during this course.

Estimated Time	10 minutes
Topic Objective	To understand the proposal writing process.
Topic Summary	The proposal writing process has seven major steps.
Materials Required	<ul style="list-style-type: none"> • Seven sheets of large-size paper, each with one step of the proposal writing process • Masking tape
Planning Checklist	Before the workshop, print one step of the proposal writing process (shown in the diagram) on a different sheet of large paper.
Recommended Activity	Have participants tape the sheets in order, to the wall.
Stories to Share	This process may appear in different forms, or phases may overlap. However, it is a good guideline.
Delivery Tips	If you have a small group, you can use legal-size paper.
Review Questions	True or <u>False</u> : Usually only one edit of the first draft is required.

Types of Proposals



There are four main categories of proposals. Note that these categories can and do overlap – proposals are unique to each situation and each organization.

A **Technical Proposal** is a specific kind of proposal that defines the technical requirements for a project. It also details the approach and complete plan (including time, cost, and resources) for the project. This proposal is excellent at showing companies how you can easily solve technological problems in their organization, without the need for them to find and hire skilled staff. Although these types of proposals are often read and approved by a technical team, it is important to include an executive summary, introduction, and conclusion that are written for the layman.

As you might imagine, **Sales Proposals** are usually written to convince a new client to purchase a product or service. This is done by building a case for why the client needs that particular product or service, and why you are the best person for the job. These are the types of proposals that we will focus on in this workshop. Because this type of proposal is essentially a sales pitch, clarity and conciseness are absolutely crucial. Make sure that this proposal focuses on what the solution can do for the customer, rather than the nuts and bolts of the proposed project.

A **Cost Proposal** is an outline of estimated costs. It is usually prepared by a contractor to prepare for project negotiations.

The following items are essential in a cost proposal:

- Solid estimates with backup data
- Detailed breakdown of all foreseeable costs, including material, resources, labor, equipment, travel, administrative expenses, etc.
- Summary of high-level costs for executives
- Professionally prepared disclaimer validating that these are best estimates only

A **Professional Service** proposal is a type of sales proposal that focuses on a professional service offering, such as public relations, marketing, or health care. Because of the focus on service, the following elements are usually included:

- List of the people who will be providing the service, and their credentials
- Organization's record of service
- Testimonials and references
- Resources available in the organization

You may also see some elements of the cost proposal, such as a breakdown of labor costs.

Estimated Time	10 minutes
Topic Objective	To understand the four major types of proposals.
Topic Summary	The four categories here include technical, sales, cost, and professional service.
Materials Required	None
Recommended Activity	Discuss the four types of proposals and which type participants have experience with.
Delivery Tips	If possible, gather samples of the various types of proposals for participants to look at.
Review Questions	Name one common type of proposal.

About Requests for Proposals



Earlier, we mentioned that the proposal process can be initiated by a Request for Proposals (or RFP). This is a document issued by a company requesting proposals for a particular project. The RFP can be as simple or as detailed as a company likes – it all depends on what they require.

Information commonly requested via an RFP can include:

- Organizational background
- Organization’s experience with the requested product or service
- Solution details
- Project timeline and budget
- Customer reference

If you are responding to an RFP always double and triple check that you have included all the information requested. If the RFP details a particular person to submit the proposal to, and a date to submit it by, follow their instructions.

Any RFP requests (such as those pertaining to style, language, format, and/or template) should supersede any company or best-practice policies. If you are not sure which set of rules should take precedence, consult with your manager.

Estimated Time	10 minutes
Topic Objective	To understand what a Request for Proposals is.
Topic Summary	An RFP is a document issued by a company requesting proposals for a particular project.
Materials Required	Sample RFP
Planning Checklist	Gather a sample RFP pertaining to participants’ industries.
Recommended Activity	Gather participants’ experience with RFPs.
Stories to Share	Other common terms you may see: <ul style="list-style-type: none"> • IFP: Invitation for Proposals • RFI: Request for Information

	<ul style="list-style-type: none"> • RFQ: Request for Qualifications • RFQ: Request for Quotation • RFT: Request for Tender
Delivery Tips	You may want to divide participants by industry and have them discuss their experiences in small groups.
Review Questions	What do the initials RFP stand for?

Practical Illustration



Kevin sat in a meeting with his co-worker, Carol. The sales of their product had hit a lull in the last few months, and they were discussing ways to increase sales. Carol said, “We could offer incentives to our existing customers. That’s also a great way to make the customer feel valued.”

Kevin said, “That’s an idea to try. I was thinking that while we do that, we could also send out a sales proposal to Ritcher International to inform them about our new product line.”

Carol said, “Have they asked us to put together a proposal?”

“No,” Kevin said. “But we could send out an unsolicited proposal, that will focus on what we can do for them, the customer.”

Kevin and Carol’s team started work on the proposal, and they were rewarded with the company’s time, attention, and interest.

Module Two: Review Questions

1.) What is the definition of a proposal?

- a) An individual or collaborative enterprise that is carefully planned and designed to achieve a particular aim.
- b) An article or substance that is manufactured or refined for sale.
- c) A line of talk that attempts to persuade someone or something.
- d) A sales pitch for a product or service that your company offers.

A proposal is primarily a sales pitch for a product or service that your company offers.

2.) Where can proposals be directed?

- a) Internally
- b) Externally
- c) To senior management
- d) All of the above

Proposals can be directed externally (to another organization) or internally (for example, to senior management, in order to gain support for a project or idea).

3.) Which of these is an example of a solicited proposal?

- a) Commercial item
- b) Technical correspondence
- c) Invitation for Proposal
- d) Unrequested proposal

Solicited proposals are written in response to a Request for Proposal (RFP) or Invitation for Proposal (IFP).

4.) In proposal writing, which two processes are often repeated several times?

- a) Editing and writing
- b) Researching and editing
- c) Outlining and researching
- d) Researching and writing

The writing and editing process is often repeated several times.

5.) Which of these statements is not true of a technical proposal?

- a) It details the approach and complete plan (including time, cost, and resources) for the project
- b) Because these types of proposals are often read and approved by a technical team, it is important to exclude an executive summary
- c) It is a specific kind of proposal that defines the technical requirements for a project
- d) This proposal is excellent at showing companies how you can easily solve technological problems in their organization, without the need for them to find and hire skilled staff

A Technical Proposal is a specific kind of proposal that defines the technical requirements for a project. It also details the approach and complete plan (including time, cost, and resources) for the project. This proposal is excellent at showing companies how you can easily solve technological problems in their organization, without the need for them to find and hire skilled staff. Although these types of proposals are often read and approved by a technical team, it is important to include an executive summary, introduction, and conclusion that are written for the layman.

6.) Which proposal can be defined as “a type of sales proposal that focuses on a professional service offering, such as public relations, marketing, or health care”?

- a) Cost proposal
- b) Technical proposal
- c) Professional service proposal
- d) Sales proposal

A Professional Service proposal is a type of sales proposal that focuses on a professional service offering, such as public relations, marketing, or health care. Because of the focus on service, the following elements are usually included:

7.) Which of these items is essential to a cost proposal?

- a) Professionally prepared disclaimer validating that these are best estimates only
- b) Organization’s record of service
- c) Testimonials and references
- d) List of the people who will be providing the service and their credentials

The following items are essential in a cost proposal: Solid estimates with backup data,

Detailed breakdown of all foreseeable costs, including material, resources, labor, equipment, travel, administrative expenses, etc., Summary of high-level costs for executives, Professionally prepared disclaimer validating that these are best estimates only.

8.) What does RFP stand for?

- a) Reminder of Projects
- b) Request for Projects
- c) Reminder of Proposals
- d) Request for Proposals

A Request for Proposals (or RFP).

9.) Which of these pieces of information are commonly requested via an RFP?

- a) Resources available in the organization
- b) Project timeline and budget
- c) Solid estimates with backup data
- d) Detailed breakdown of all foreseeable costs

Information commonly requested via an RFP can include: Organizational background, Organization's experience with the requested product or service, Solution details, Project timeline and budget, Customer reference

10.) What should any request for RFPs supersede?

- a) A cost proposal
- b) A statement of work
- c) Any company or best-practice policies
- d) The duties of any job description

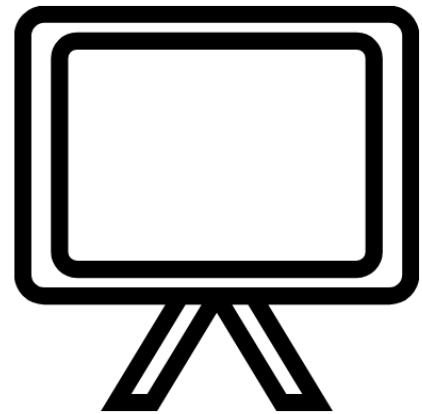
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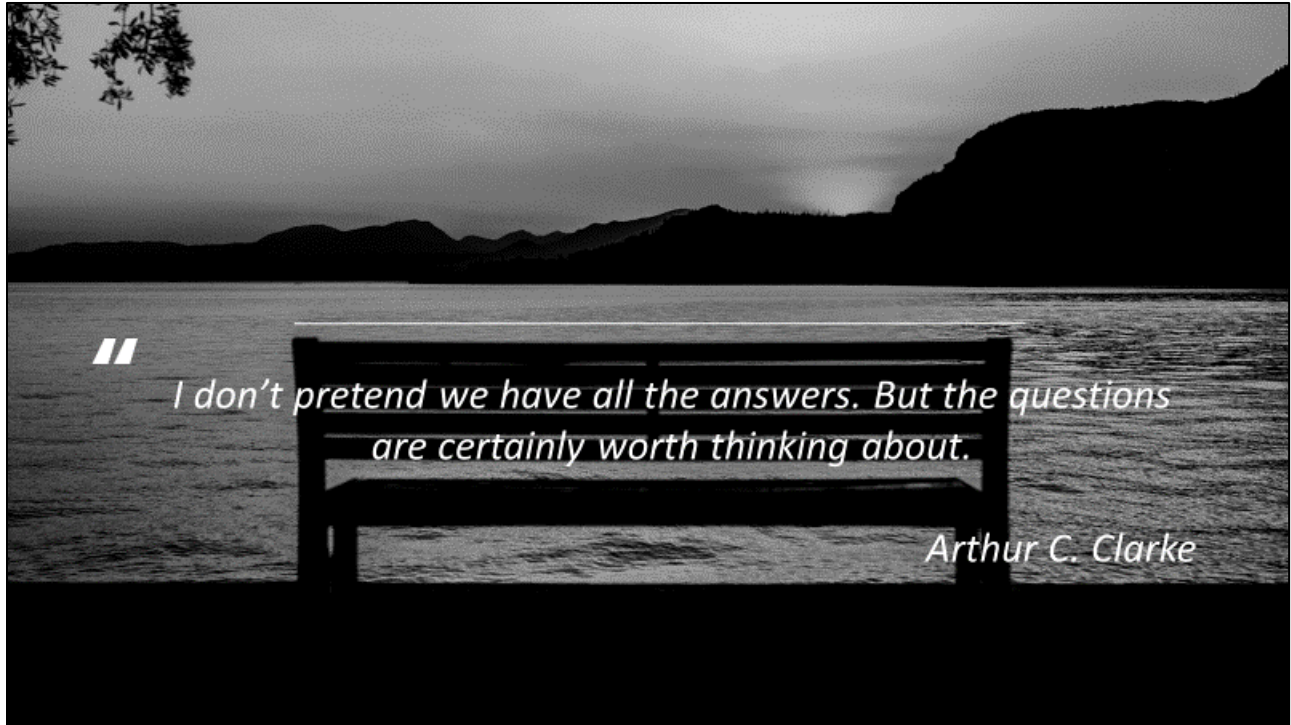
PowerPoint Slides



Below you will find the PowerPoint sample. The slides are based on and created from the Instructor Guide.

PowerPoint slides are a great tool to use during the facilitation of the material; they help to focus on the important points of information presented during the training.

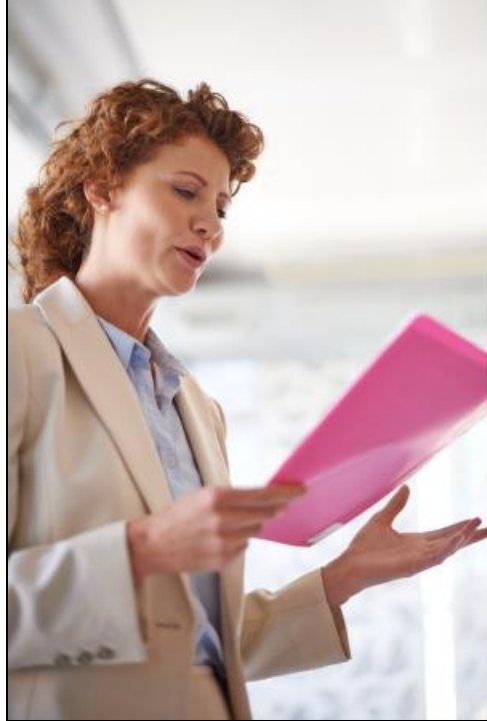




MODULE TWO

Understanding Proposals

Proposals are a very unique type of business document. Note that we only provide an overview of the four major types; there are many variations on these types, as well as more specialized categories.



What is a Proposal?

A proposal is primarily a sales pitch for a product or service that your company offers.

The Proposal Writing Process

- Perform needs analysis
- Create the goal statement
- Create the outline





Types of Proposals

Technical
Proposal

Sales
Proposals

Cost
Proposal

Professional
Service

About Requests for Proposals

- Solution details
- Project timeline and budget
- Customer reference

Practical Illustration



- What is a Proposal?
- The Proposal Writing Process
- Types of Proposals
- About Requests for Proposals

Module Two: Review Questions

1. What is the definition of a proposal?

A. An individual or collaborative enterprise that is carefully planned and designed to achieve a particular aim

B. An article or substance that is manufactured or refined for sale

C. A line of talk that attempts to persuade someone or something

D. A sales pitch for a product or service that your company offers

Quick Reference Sheets



Below is an example of our Quick Reference Sheets. They are used to provide the participants with a quick way to reference the material after the course has been completed. They can be customized by the trainer to provide the material deemed the most important. They are a way the participants can look back and reference the material at a later date. They are also very useful as a take-away from the workshop when branded. When a participant leaves with a Quick Reference Sheet it provides a great way to promote future business.



Proposal Writing Quick Reference Sheet



Identifying Your Purpose and Your Audience

Your proposal should have a single goal in mind. What exactly will the proposal do? Some examples:



- Convince a customer to buy the WidgetMaster 3000
- Convince a customer to hire you to demolish a building
- Outline the meal planning services that your company provides

Writing the Goal Statement

Once the needs analysis is complete, it's time to write the goal statement. This will help you understand what you want to achieve.

First, identify the type of proposal. Throughout this course, we will be focusing on a generic proposal. However, having a more defined type in mind will help you create a more successful proposal. You may choose a type discussed in the previous module (technical, sales, cost, or professional service), or it may be of a different type altogether (such as a non-profit grant proposal).

Next, add in the purpose of your proposal. Finally, bring it all together into the goal statement. This statement typically takes the form: Our <type of proposal> will convince the reader to <desired end result>.



Using Illustrations

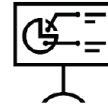
A picture is worth a thousand words... if it is done correctly. Let's look at some tips.

Some overall tips for diagrams:

Only use an illustration if it helps to convey your point.



Make sure to use the proper type of illustration, particularly if you are using a chart.



Each illustration should convey one major point.



If your proposal includes many illustrations, number each sequentially and include a Table of Figures at the beginning of your proposal.

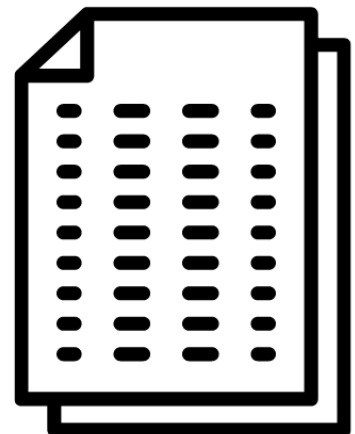
Handouts



Each course is provided with a wide range of worksheets.

Worksheets help check your participants' understanding. If a lesson calls for a worksheet, it will be listed in the Lesson Plan box under Materials Required. All worksheets are customizable and can be found in the Appendix of the Instructor Guide and the Training Manual.

As a trainer, icebreakers give your participants the opportunity to get to know each other better or simply begin the training session on a positive note. Icebreakers promote collaboration, increase engagement, and make your training more light-hearted and fun. Below is an example from the Icebreakers folder.



Icebreaker: Ball Toss

PURPOSE

To help participants get to know each other.

MATERIALS REQUIRED

Use a small lightweight ball that you can easily toss around the room, like a NERF ball.

PREPARATION

1. None

ACTIVITY

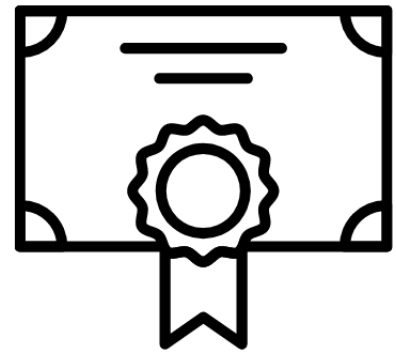
Toss a ball to one of the students who then makes the first introduction and shares one interesting fact about themselves. They then throw the ball to someone else. Challenge the group to complete the introductions without throwing the ball to the same person twice.

Tip: You may wish to have a member of the group toss the ball to you, too.

Certificate of Completion



Every course comes with a Certificate of Completion where the participants can be recognized for completing the course. It provides a record of their attendance and to be recognized for their participation in the workshop.



CERTIFICATE OF COMPLETION

[Name]

*Has mastered the course
Proposal Writing*

Awarded this _____ day of _____, 20____

Presenter Name and Title
