A strong business proposal is a top opportunity to win new business. It is the ultimate sales document, a condensed version of all the value your solution brings to a client's problem.

Yet, not every proposal puts your business's best foot forward. There are a lot of aspects to consider. From the audience to the content to the formatting, each part of a winning business proposal requires thoughtful planning and development.

While it can seem daunting, we will outline the key stages, styles, and content of a winning proposal. There are also a number of helpful tools and tactics that will improve your bid and sales strategy. Incorporating these concepts will produce stronger, more appealing business proposals.

What is a Proposal?

In order to provide a productive guide to a business proposal, we need to clarify to which document we're referring.

A business proposal is a written offer of services tailored to a client.

Perhaps not every definition uses the word 'tailored'. However, as it is a crucial characteristic of a successful proposal, it is a key word for our definition.

A proposal is *not* a business plan. Business plans present a company's operational and financial objectives. While it's an important corporate document, it is very different than a proposal. Confounding the two will produce either a poor business proposal or a poor business plan.

A business proposal is created for a specific request or opportunity. It is not prepared as a cold call to a client. There is always an indication provided by the client as to the business needs. This indication may come as large as a public governmental Request for Proposals (RFP) or as small as an email follow-up to an encouraging conversation at a networking meeting.
The reason that a proposal cannot arrive as a cold call is because it must be tailored the client's needs. The document will clarify how your services can best resolve the client's problems.
If you do not know the client's problem, you cannot propose a solution.

Preparation

The preparation phase will make or break your proposal. It ensures that the document doesn't just say who you are, but identifies why you are the best choice to serve the client.

Audience

The proposal audience is the most crucial factor to get right when preparing the proposal. The writer must understand the reader on the other side of the document.

Consider these questions:
- What is their role?
- Who is the decision maker?
- What are their main concerns?
- What supports or resources do they already have?
- Which solution would provide the best value?
- What is their industry background?

A common mistake is to write a generic proposal. A proposal written to describe your services to any audience will have little impact. The client does not want to interpret how your offerings will benefit value – that is the writer's task. Generic proposals do not provide a clear or persuasive document.

To ensure your proposal is as effective as possible, prepare, plan, write, and review with the audience in mind. Time spent understanding the reader will save time during the later proposal development stages.

Findings Discussion

A winning business proposal generally begins with an in-depth findings discussion. The writer collects information on the client's current problem, their goals, and potential solutions. This broad discussion gathers content from the key stakeholders within the company. Participants may include a sales representative as a direct contact, a business manager with competitor analysis, an R&D researcher on new solutions, or anyone else who can provide input on the client's needs.

Your proposal is a response to their problem. Therefore, your writer or team must have a deep understanding of their concerns, needs, and wants.

With a strong awareness of the problem, you can then propose a solution. This is the heart of the document. Your company has to pitch an offer that better suits the requirements of the client than any of your competitors.
Your proposed solution should be effective, efficient, and valuable. And each of these qualities has to be clarified within the discussion so that they can be communicated within the document. What is the overall strategy? Which features make it more cost-effective? How will your solution make the client's work easier and better?

The findings discussion ensures the writer truly understands the client and the solution.

Ask 'Why?'

A proposal does not highlight how great your business is. It highlights how great you can make your client's business. This is one of the first things we teach in our proposal writing course.

A simple but important question to align yourself with this philosophy is: "Why?"

Why should the client choose you?

Incorporating the audience and the results of the findings discussion, you should critically analyze your solution. Where do you add value? How does your solution increase the client's long-term success? How do you uniquely resolve problems? Which aspects verify your trustworthiness? What impact will your solution have on their business?

Have you worked and proven yourself before? Familiarity allows the proposal to be more refined and narrow, whereas a new client requires more detail as to your capacity to solve their problem.

Competition

Your proposal will likely be reviewed with a series of competitors. Therefore, understanding what your competitors may offer will improve your own submission.

Some RFPs provide a list of all those companies who downloaded the proposal documents. Other times, your own understanding of your industry will indicate the likely competitors who will also be submitting.

If possible, review your competitor's previous work to give you context as to the solution, strategy, and pricing they will offer. Refine your proposal plan so that it is more appealing than your competitors.

Mindmap

Feeling overwhelmed?

All the guidance we've provided on this preparation stage may seem filled with questions, ideas, and content. It has to be organized in order to make a coherent and compelling document.

We recommend using a [mind map](#) tool. It allows you to capture all of the ideas, and their relationships, that need to be incorporated into one visual layout. [FreeMind](#) is a free, open-source Mind Map tool that takes only ten minutes to learn.

Using a mind map will ensure you capture all the important concepts. Then, you can organize them into the core of a cohesive proposal document.

Contents of A Proposal

There is a range of formats and styles for preparing a proposal. The outline below is the content order that we have tested as most effective.

How to Write a Proposal Title

The title should be snappy, engaging, and be a one-line overview of the entire proposal.

"Proposal to XYZ Company" as a title is a lost opportunity. It's boring and doesn't offer the audience any valuable information.

Remember how important the audience is? Imagine what sort of title they would like to read.

We'll use an example of an engineering services to a construction company:

Rock Solid Foundations: Geotechnical Site Assessment Offer for XYZ Construction

If you're unsure of the title, don't worry. It can be composed at the end of the writing stage. That may even be a better time to title the document as the writing process may inspire the perfect title.

How to Write an Executive Summary for a Proposal

The executive summary should be exactly that: a summary for a busy executive.

It should synthesize all of the key information of the proposal. This information is presented it in a compelling and digestible way so that an executive can quickly understand the entire proposal.

It should introduce relevant information of the proposal and highlight how it solves the client's problem. The summary should be persuasive, clear, and include only concepts from the proposal. (No new information introduced here!)

We have an entire course dedicated to how to write a executive summary. You can view the executive summary writing course here.

Overview or Opportunity Statement

This section dives into client's problem and your solution.
Here, you can present your thorough understanding of the client's problem. It may or may not take the shape of a full analysis. The depth of analysis depends on the specific proposal.

Some clients may have already clarified their exact problem. Others may simply have a goal or KPI (Key Performance Indictor) they want to meet and are unsure of their current barrier. Whether brief or in-depth, the first goal is to indicate your knowledge of the problem. The client needs to feel their issues are understood to trust that a proposed solution will be successful.

Your bid should then neatly and effectively resolve their problem. Clarify how each facet or stage of your proposed strategy will add to the overall solution. The reader should be able to draw a straight line from your solution to their problem.

Use specific and jargon-free terminology to outline your offer. No matter how technical the solution is, the writing must be accessible and audience-focused. In the engineer services example, the document would be written differently if the reader, i.e. the construction company executive or manager, is totally comfortable with geotechnical work or undertaking it for the first time.

If you're unsure if your technical writing is accessible, check out our [Beginner's Guide to Technical Writing](#) for a refresh.

This section also defines the scope of the solution. It's important to clarify where the solution begins and ends. For example, a website revamp may include the site design, graphics, and hosting, but does not include developing the copy or images.

A proposal can offer additional services beyond requested ones if your experience deems it valuable to the client. It is an opportunity to show your knowledge of successful implementation and potential to increase the budget. Most importantly though, clarifying the scope will ensure both parties are on the same page, alleviating future misunderstandings.

Deliverables and Timeline

Following the overview, your proposal should clarify the specifics of 'what' and 'when'. This section offers the client with specific details of how the solution will unfold.

The deliverables should be clearly identified as to what the client will expect to receive or have accomplished. These should be specific and never over- or under-promise.

The timeline indicates the client when the deliverables will be completed. The timeline may be strict, based on client specifications. It may be flexible, based on your anticipated timeline or contingent on the offer acceptance date.

Having a clearly defined and realistic timeline is key. Often projects take longer than expected. Make sure to identify potential weaknesses of the timeline and address them directly. A detailed timeline will show a clear understanding of the project scope and implementation.

Creating a Proposal Budget

The all-important budget. Some readers will skip through the document and read the budget first, then return to the rest.

Therefore, it should be accurate, competitive, and easy to understand.

While both project and hourly budgets are common, we recommend using a fixed-price quote where feasible. Hourly projects can be difficult for a client to estimate for overruns. A fixed-price bid allows you to estimate the entire project's cost and clearly compete on value.

No matter which type of budget, the total bid value should be broken down into smaller items.

For example, public relations services for a book launch may submit an offer for $3,500. This one number may seem reasonable to some clients and shocking to others. To ensure all clients understand the number, break down the costs.

In this case, break out the $3,500 into copywriting for $700, media liaison for $800, media training for $1200, book launch logistics preparation for $500, and administration for $300. The additional details allow the client to understand your solution and your value.

Separating the costs also allow clients to understand the higher investment areas. Your overall proposal should support each budget item by a clear client benefit.

About Us

Many people might be wondering: "Doesn't this section come first?"

Putting the 'About s' section at the beginning of the proposal is the most common mistake we see in proposals.

Think about it: if you're the reader, what are your first questions?

The client is generally concerned with 'what is the solution?' and 'how much does it cost?' If these items are agreeable, then the client looks into the company background.

This order keeps the audience in mind. The proposal tells the story of why your solution is the best, and the About Us section is the compelling last line, not the opener.

You can be creative in this section. It should provide contact information, background on your company, the key personnel on the project. It can also include previous statistics, case studies, or sample work that would provide convincing evidence of past success stories in similar projects.

Graphics & Design

Graphics can make it easier for the reader to understand your proposal. They can also be poorly so designed or flashy that they detract from the project proposal. Graphics can help make a positive first impression. If there is a graphic designer at your company, you should ask them for advice before you start writing. They may have a template or guidelines to follow.

Here are some ways graphics can make your proposal better.
- More legible data tables
- Clearer charts and data visualizations
- Easier to skim by using typographic hierarchy
- Using whitespace liberally
- Choose legible fonts

Here are some common mistakes to look out for when creating graphics.
- Cheesy stock images
- Images that are [disproportionately scaled](#)
- [Widows and orphans](#) (in typography)
- Using too many colors that are not part of your brand
- Using too many typefaces (stick to two or three)
- Not compressing PDFs for export (don't make your file too large)
- Low-resolution images that are pixelated
- Not using [transparent PNG logo files](#) (ask around for the .png version)

Terms and Conditions

The fine print falls at the end. Many companies have a standard proposal T&C to insert. Other companies may not require this information as the details will be negotiated upon selection. The client and the industry will define the content included in this section.

Templates

In-house or online, proposal templates can be a big time-saver.

So long as they're good templates.

You can read a critique of our favorite [proposal templates in this blog post](#).

Value

There's no need to re-invent the wheel each time you submit a new proposal. The core of your business doesn't change, so generic information can be compiled in an industry-effective order for reuse.

A well-organized template can save valuable time for similar projects.

In-house Templates

Many companies have developed in-house templates for standard industry proposals. Previously successful proposals are generally used as the basis for company templates.

Rise of Online Software

Online proposal software is growing in availability and popularity. There is a range of providers who bring the in-house template into the online space. This format allows for cloud-based proposal editing, pre-designed templates, and interactive proposals.

Potential issues

Templates can be dangerous because they may tempt the writer into creating a generic proposal. Each bid must be crafted to meet the client's specific needs. Language or content that worked work for one client may be unimpressive to another. Yet, it can be too easy to re-use template information without revamping for the new audience.

Use templates with caution.

The template can be a tool, but it should not always be used. Some proposals will fall easily into an existing template. Some proposals will need to be started from scratch. The preparation phase will allow the writer to determine if a template is appropriate.

Ensure that you have multiple individuals proofread the document. An easy way to lose a bid is by having text that is clearly copied from a previous proposal.

RFP Response

A major consideration for template modification is request for proposal (RFP) response. Many RFPs indicate the desired order and details of the [proposal](). The document should then match the RFP so that the client can easily find the appropriate information.

This response may mean that the Overview may use headers that match RFP specifications. RFP codes or numbers may be incorporated into the Deliverables text. A careful review of the RFP for formatting information will ensure this step is completed properly.

Choosing a Writing Style

Business writing overview

All business writing is purposeful. Its goal may be to persuade, educate, or advise, depending on the audience and the document. It is a formal style that maintains accessibility to the reader. All proposals are written using business writing style.

Be persuasive, positive (and realistic!)

Your proposal is intended to sell your company so it must be persuasive. The text should be crafted to elevate your solution above others. Use strong, convincing language as you present your concept.

Including positive words or phrasing will add to the appeal of the proposal. Clients want to see positive results and successful projects. Positivity from the proposal itself reads well.

While persuasive and positive, the text must also be realistic. Only accurate information that can be completely delivered should be included.

Vague statements will damage your chances of winning as they do not provide the client with clarity or confidence. Over-promising may win a bid, but the results will likely be under-delivered. Failing to meet deliverables will damage the long-term relationship with the client and tarnish your reputation in the industry.

Be precise and concise

To ensure your language is realistic, be precise in your text. Use specific terms to identify the strategy and results. These details allow the client to clearly understand what they will receive upon accepting your offer. Ensure your proposal makes the image of your winning solution crystal clear.

Imprecise: The design work will be successfully delivered.
Precise: The website header and logo design work will be provided in both web-ready and editable files within one month of offer acceptance.

Be concise. Everyone is busy. Assume your audience is really, really busy.

Your proposal should include all the required and useful information, without any fluff. Remove extraneous words, sentences or even sections that do not add value to your reader.

Use active voice and simple wording

The active voice is stronger and easier to read. It is the natural choice for business proposal writing.

Passive: The materials will be delivered to the site by our trained operators.
Active: Our trained operators will deliver the materials to the site.

Another common mistake in proposals is writing to sound impressive. Of course, a proposal needs to impress the reader, but for the right reasons. Extravagant or highly-technical text actually causes the reader to be less engaged with the text. It is more difficult to understand and therefore less effective at communicating the information.

Simple wording will ensure the text stays accessible. As always, keep the audience in mind and write in the simplest terms appropriate for the reader.

Avoid jargon. Terminology specific to an industry is confusing to an unfamiliar reader. Use common terms or thorough explanations to ensure the audience can understand.

Complex: Our website review will ensure great UX through implementation of HTML, CSS, and Javascript revisions.
Simple: Our website review will ensure great user experience throughout the site by revising the design and organization.

Tone

A business proposal's tone is always professional. However, the level of formality depends on the industry and the existing relationship with the client.

If the client is entirely new, maintain a formal but friendly tone. If the document is for a repeat client, allow the existing relationship to guide the level of formality. It may be more relaxed or personal, if appropriate.

Proposal Formatting

All business readers skim documents.

Often, the proposal will be given a first quick review. If it meets certain guidelines, then it will be read more thoroughly in the next phase of evaluation. Another process may be that a thorough review is completed and the top bids sent to an executive for a fast review and decision. Or, perhaps the client needs to quickly check a strategy detail to discuss amongst colleagues.

While you won't know your client's exact assessment process, clever formatting creates an enjoyable and effective experience for the quick reader. The ease of reading your proposal may be a differentiating factor from a competitor.

Great content needs a great stage. The following general guidance will create an accessible and inviting document.

Tiered information

Headings and subheadings are your friends.

Divide your text into appropriate sections and craft a clear, guiding title for each heading. Add a division wherever the proposal text naturally changes topic. These changes need to be documented with headings for the reader for easy reference.

A table of contents provides the complete outline of a lengthy document including all headings and subheadings.

White Space

White space is pleasing to the eye. It appears as sleek and modern and makes the text accessible. Large blocks of text or content without white space makes a document feel cluttered. The reader gets overwhelmed with information and can start to skim.

White space allows you some control of your reader's focus within the proposal.

There are many ways to add white space to a text document. Adding additional spaces between paragraphs or headings, adjusting margins, and even font change are useful tactics. Another highly valuable tactic is:

The single paragraph sentence.

One sentence on its own draws the reader's attention. It is clearly important as it stands alone. This formatting trick should be used carefully to emphasize only the most essential elements.

Lists and Tables

List and tables should be added to your proposal because:
- they are easy to read
- they provide an eye-catching change on a page of text
- they emphasize the listed or tabled information as important.

As demonstrated above, lists and tables add value to your proposal. There are many natural places where lists or tables can be used. A list presented within a sentence and comparative data would be best presented in these formats.

Sentence:

Our Facebook campaign fee includes advertisement design, Facebook Ad charges, and staff administration.

List:

Our Facebook campaign fee includes:
- advertisement design
- Facebook Ad charges
- staff administration

The list or table can be followed by narrative text to provide additional context to the reader.

Visual appeal

When your client receives your proposals, they should want to open it up right away. The look of the document must be professional but striking.

Visual appeal can be added through the use of color, images, fonts and layout design. These features are like the proposal's outfit. They make an important first impression before any word is read.

Review

A thorough review is crucial to the document's success. Proposals need to be audience-focused, accurate, persuasive, competitive, well-formatted, and more. A review catches issues or errors that could either lose the bid or cause costly future misunderstandings in a winning one.

Each company has their own proposal review process. They will include an iteration of the following review phases.

Writer's review

The writer's review should ensure that the text is error-free.

Obviously, it must be free of grammatical and spelling mistakes. This check can be assisted through the Spelling and Grammar tools in Microsoft Word or the free online tool [Grammarly](#).

The proposed solution must also be accurate. Triple-check timelines, budget values, material amounts, hourly estimates, and other specifics. This verification ensures that the proposed solution is clear and correct as to what you can offer the client. An incorrect statement could [cost your company millions of dollars](#).

Internal review

An internal review should be completed by a colleague or supervisor. This check provides another audit of the writer's review items.

In addition, the reviewer has a fresh look at the document and its ability to persuade. This removed examination ensures that the proposed solution and supporting materials are understandable and appealing.

Overall, the proposal must make a clear and convincing ask for business. Sometimes, this core task can be hidden when a proposal writer is too close to the document. The internal review ensures the sales pitch is obvious.

Client review

The client review phase may be applicable depending on the client's wishes. Some customers may want to review an initial version and upon selecting one or more top candidates, request revisions to the proposal. When their comments are accepted and incorporated, a final version of the offer can be signed.

Having a client's feedback is ideal, as it provides direct insight into their needs. This review enhances the writer's understanding of audience, which benefits the current and future work.

Proposal Submission Tips

Once the review process is complete, proposal needs submitted to the client. It may appear as an easy last step, but it should not be taken lightly.

Review submission details

Each RFP and most clients have a specified or preferred submission process. Ensure your document is provided to the client on exactly those terms. These details may range from an online document upload link to directions on the number of hard copies to the formatting of the document itself.

These details are provided to ensure the client's ease in handling a volume of documents. They also highlight your company's attention to detail.

For example, an environmentally-conscious client may that request all hard-copy proposals be printed double-sided. This request may seem simple. Yet, if missed, a one-sided proposal is a glaring sign of ignored instructions.

A perfect proposal can lose a contract if submitted incorrectly. Double-check that each of the submission requirements and processes is met.

Transmittal email or letter

A covering letter is a nice touch for both online and offline submissions. It can be the text of a submission email or the top sheet of paper in a mailed hard-copy of a proposal.

This letter, though brief, must be well-written. Using business writing principles, it introduces the proposal document. It should include any key names or codes associated with the proposal for sorting purposes. It also creates a space to indicate the next action. Company contact information for quick reference should also be provided.

Client Follow-up

Client relations are an important part of each business. The document represents the value your company brings. Yet, they do business with people, not documents.

Follow-up with the client appropriately after the submission of the proposal. Each client relationship will define the timeline and depth of the inquiry. Some clients may expect a call to dig into the proposal details and negotiate the work. Other clients, especially government offices, may stipulate on the RFP that no follow-up is allowed.

Appropriate follow-up is the final step in proposal development.

Conclusion

A winning business proposal is your opportunity to showcase your business's skills and your unique strategy to meet a client's needs. Developing a strong proposal is not a quick or easy task. But, when done well, it is the key to business success.