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## Why Your Last Competitive Technical Proposal Failed: Ten Top Reasons

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## There is No Formula or Trick . . .

Reliable Maxims	There is no formula for writing a winning proposal. And there are certainly no tricks. But there are reliable maxims, guides, and strategies that separate the more successful proposal authors from the less successful.
Poor Selling	Nothing, of course, can substitute for good ideas or for the right match between a problem and a solution. But too often the deserving bidder, the best candidate, the superior offer is undermined by poor selling and flaccid communication. The protests below are meant to right that wrong, to increase the chance that a proposal that deserves to win does so.

### 1. You Had No Chance of Winning.

Risk	Even if the competition was fair, you may not have had a chance. Your rivals may simply have been far better qualified and far more experienced—something your management should have known. There are even cases where the playing field is not level, where <i>one or two firms have to win</i> . Again, you should recognize these cases.
Track Record	<i>Track record</i> is a useful figure of speech for talking about proposals, so long as you remember that we are talking about the gambler, not the horse. The decision to write a proposal is a high stakes bet. In research companies especially, the money sunk into proposal writing is often the company's capital. And yet, most companies, especially small companies, have no formal scheme for evaluating proposal opportunities. They pick projects the way most people pick horses. Every prospective proposal should be <i>handicapped</i> , systematically appraised and assigned a probability of paying off. Every company should have a formal bid/no-bid model, which includes a threshold of acceptable risk.
Criteria	Most successful companies quantify several decision factors: for example,

- the current relationship with the customer;
- the number and strength of the competitors;
- the probability that the project will not be awarded at all or that it has been virtually promised to another firm;
- the closeness of fit between what is asked for in the tender document and what the firm can offer

Smart companies also evaluate the *attractiveness* of the project:

- potential profits;
- compatibility with company plans;
- interference with other projects or proposals . . .

#### Decision Models

There are hundreds of different ways to build these decision models, but wise companies nearly always have them in some form. Unwise companies pick projects on impulse, often infuriating their own employees by waiting until the last moment. Others pursue nearly every project that is announced—the *lottery* approach. In my own company, we will not write any proposal unless we believe the chances for winning are at least 50%.

#### Risk Thresholds

Of course, this maxim is conservative. The annals of technical marketing include many winners that had no chance, that should have, by any reasonable appraisal of the situation, lost. Sometimes we write proposals in desperation, or merely to make ourselves known in a new market. And sometimes these casual, ill-considered, desperate, improbable proposals find themselves alone on the customer's desk. Please remember, though, that when you write a proposal you are spending the owners' capital; if you want to invest in long shots, you should probably use your own money.

#### Timeliness

Every new opportunity should be run through the decision model quickly. *There are few management practices more unproductive and demoralizing than the habit of deferring bid/no-bid decisions for several weeks, thereby forcing the staff to produce crash-time proposals of dubious merit.*

## 2. You Were Not *Traceable*.

Checklists	Often, the first people to see a proposal are reviewing it with a checklist. If the reader believes your response lacks an item on that list—even if you are sure it is there—your proposal may be disqualified.
Two Audiences	Most proposals are read by two classes of readers: those who wish to know what you think and <i>those whose only objective is to disqualify you</i> . This latter group is typically the first bank of readers, administrative types (human robots) whose task is to reduce the number of competitors to a short, manageable list. To this end, they are hoping that you will be unresponsive in some way, that you will leave out one of the many forms, or fail to provide the right number of copies, or otherwise allow them to mark you down for an infraction on their little checklists.
Traceability	If they cannot disqualify you for obvious errors of compliance or packaging, they will look inside the document to see if you responded to every item in the scope of work. Here is where successful proposal writers have developed the craft of <i>traceability</i> , making sure that the proposal contains everything asked for and that the reviewers can find it without a struggle. To achieve this, the proposal-writing team must first compile its own checklist, derived from a meticulous study of the tender package (RFP); then it must ensure that every item is not only addressed but <i>labeled in the vocabulary of the RFP</i> .
Headlines	The most straightforward route to traceability is through <i>titling</i> : how we name the sections. For example, if the RFP wants a chapter called Personnel, do not give them one called Staff. Even more powerful is the use of <i>thematic</i> headings, as developed by the proposal writers at Hughes Aircraft in the 60s. [ <i>Sequential Thematic Organization of Proposals (STOP)</i> Tracey et al, Hughes Aircraft, 1965] In this approach, the document is made up of short modules and each heading captures a relevant item from the scope of work.

If, for instance, the SOW says that the offeror must have experience in multi-platform software, then one of the headings is **ABCO's Experience with Multi-Platform Software**. If the RFP wants someone who can explain technical reports to nontechnical audiences, then a section is called **ABCO's Techniques for Explaining Technical Reports to Nontechnical Audiences**.

### 3. You Were Indistinguishable.

- Why You! One well-known proposal consultant says that the main question to be answered in a proposal is: *Why You!* Why would the customer, given several perfectly acceptable competitors, choose your offer above the others'?
- Win Theory The only widely accepted theory of proposal writing—known as win theory—is that proposal success depends on finding some exploitable difference between you and your competitors and emphasizing it at every opportunity in your writing and subsequent negotiations. Instead of believing, innocently, that your readers will be eager to read your proposal and grateful for your solution to their problems, *it is better for the proposal writer to presume that the customer would find it much safer and more justifiable to choose one of the competitors.*
- Defensible Choice A useful exercise is to imagine that the customer has chosen your proposal (from among several in a stiff competition) and that suddenly he or she is beset with criticism and rebuke by superiors, by associates, even by the press. Imagine that the customer has received a call from the local newspaper and that its leading investigative journalist is looking into the shocking rumor that this customer has chosen your offer over the others. What would you have the customer say to the reporter? In 20 or 30 words, why was picking your offer the smartest possible choice?
- Before You Write . . . In general, you should not write a proposal until you can answer that reporter's question, state the proposal's main selling theme, and be sure that it is quite different from what your competitor's answer would be. Moreover, if you do not know who your competitors are and what their answers would be, your chances of winning are substantially reduced.

Fungible Offers

But what if you cannot define an exploitable difference? What if, because of the nature of the project or the particular mix of competitors, there are no differences that matter? What if, for example, a city needs an environmental study and there are eight firms, equally competent and comparably priced, who might get the job?

My advice in this situation—although many would disagree—is to pass up this proposal and invest your time and money in something better than an 7-1 shot.

#### 4. You Showed No Superior Insight.

Business Relationships

Actually, it is quite difficult to imagine a community in which eight consulting firms have an equal chance of winning a city contract—even if that is the official story. Proposals do not begin business relationships; they consummate them. Winning proposal authors know beforehand that tenders (IFBs, IFQs, RFPs . . .) are coming, well before they come. In major military and aerospace procurements, most of the proposal is written *before* the RFP arrives. There is nothing illegal or even improper about this. On the contrary, the developing and maintaining of trusting relationships between potential customers and potential vendors is the main dynamic of technical marketing.

Knowing the Client

Among the most important criteria used to evaluate technical proposals is *the offeror's understanding of the problem*. To innocent and naive engineers and scientists, this seems to be a technical criterion, an assessment of the power of the analysis in the technical component of the proposal. In fact, though, what is meant by understanding of the problem is usually understanding of the *client*.

Genuine Interest

Many years ago, when I was preparing my first proposal-writing seminar, I interviewed some friends who were federal project officers, the people who pick the winning proposals. Repeatedly, they told me that what most impresses a reviewer is evidence of a genuine and long-term interest in the activities, problems, and aspirations of the customer's organization or agency. As one fellow put it to me: " We are not interested in awarding large

sums to firms who only became interested in us the day they found out we had money to spend.”

#### Inside Information

Put another way, a winning proposal nearly always reveals a deeper knowledge of the customer than can be learned from the RFP or any other easily available public documents. A thorough “understanding of the problem” usually entails familiarity with events, documents, and issues that are not in the public domain, even when the bidder is not supposed to have access to that information. Short of outright espionage, the more inside knowledge evident in a proposal, the better.

## 5. You Forgot to Sell.

#### Selling, Again

Put simply, the objective is to define how the features of our own offer differ from the features of the competition’s offers, and then to prove that our differences yield important benefits to the customer.

Why is this simple formula—the identification of differences and their recasting as sales themes—so elusive for technical professionals, especially engineers?

#### Real Differences

Although there are many technical professionals who talk as though all properly credentialed consultants (and by extension all their firms) are virtually interchangeable, there are, in fact, wide differences in the quality of offerors: differences in reliability, integrity, thoroughness, and loyalty to the customer. There are often even wider differences in methods and technology, with important implications for the project. These differences must be explained to the customer, then sold.

#### Parity Products

A second problem is that most of the selling we see on TV and read in magazines is for *parity products*—products like beer, cars, and headache remedies that are virtually identical with at least one other product in the market place. To sell a parity product, like an over-the-counter painkiller, one must either misrepresent its benefits (relative to its identical competitors) or engage in irrelevant entertainment (a medicine show).

Not Parity

But the services and products we sell in our proposals are NOT parity products; our offers are NOT interchangeable with those of our competitors. Therefore, we *can* define genuine differences and sell them.

Selling and Chunking

*Every section of a well-made proposal teaches, proves, or sells what is unique to this offer.* At Hughes Aircraft, the origin of many of the innovations in proposal technology, the publications engineers invented the idea of breaking immense technical proposals into two-page chunks, “small, illustrated essays with a single theme.” These *two-page spreads* begin with a thematic heading, a summary overview, and then all the text and pictures or other exhibits needed to develop the theme, make the point.

## 6. You Turned Your Authors Loose.

Undisciplined Writers

*The worst mistake an organization can make at proposal time is to turn loose a handful of technical professionals, each with a piece of the RFP, each responsible for a substantial part of the document.*

Detailed Plan

Before proposals are written they must be closely planned and modeled, with detailed thematic outlines. A small group of sales-oriented professionals must define the main selling theme, the subsidiary themes, and ensure that every one of these themes, as well as every item in the scope of work, is traceable within the table of contents. Engineers, scientists, and analysts—especially in the early parts of their careers—must NOT be given freedom to determine the scope, content, and sequence of proposals. In the best case, the emerging document is chunked into the small essays mentioned above, each containing no more than 1,000 words of text, each fully specified before the writer is set loose.

Resentful Writers

Unfortunately, many of the people working on a proposal have been conscripted; they resent and dislike the assignment, especially if it is done after hours, and especially if writing has been a recurring career problem. Their goal, too often, is to cover some pages with appropriating looking material and be done with it. What can we expect from reluctant writers who, like whining children, want to cover the minimum number of pages and be excused from the writing project?

What, moreover, should we expect from people who scarcely ever read a paragraph all the way through, or who cannot grasp a memo unless it is in bullet form?

Specs All proposal authors, especially these reluctant ones, must write to specifications, prepared by senior employees, which will guarantee that every page contributes to the sale.

## 7. You Hedged Too Many Promises.

Commitment Large stretches of a technical proposal consist of promises: schedules, resources, personnel . . . Not surprisingly, then, successful proposals come from organizations that are reputed to *keep their promises*. Nothing more impresses a prospective client than the unqualified pledge that specific people will be committed, for a specific large share of their time, to the proposed project. And, similarly, nothing makes a prospect more wary than hedged promises and evasive commitments.

Resource Uncertainties Of course, everyone who works in a proposal-driven business understands the dilemma. A proposal is at best a strong possibility of work; at any time several proposals, pledging the same resources, may be out for consideration. What will happen if the offeror is especially successful and key people are over-committed?

Hedging To protect themselves against this conflict, most companies will draw back, promising, for example, that the project will be led by Dr. Jones “ or a person of equal qualification.” Other firms will not even go that far; they provide a list of employees and their CVs and promise no more than that the project will be staffed from among the people on this list—or perhaps someone else equally qualified.

Character Faults All this hedging, qualifying, and equivocating make for a proposal that lacks character. Even though this unwillingness to commit may be justified by special circumstances, it would be far wiser to alter those circumstances than to continue offering evasive half-promises. (For example, you could remove the name

of the person who is unlikely to be available and replace it with someone sure to be available.)

#### Guarantees

Customers, after all, are not fools. They have been burned by empty promises in earlier proposals and can spot the hedged bet at a great distance. But they also know that, downstream, predictions and promises, even those made in earnest, will almost always need adjustment. Everyone knows that any project is vulnerable to strikes, shortages, weather, illness, and death. But customers still expect a serious promise from an offeror whose reputation is for keeping promises. And most also expect enforceable guarantees and protections.

## 8. You Published Your First Drafts.

#### The Big Problem

*First drafts are not good enough.* A main difference between amateur and professional writers is that amateur writers think the first draft is a finished document, while professionals view it as a raw approximation of the finished work.

#### Editing Time

Although engineers, scientists, analysts, and other technical professionals usually protest that there is not enough time to edit and revise their drafts, this is really just an excuse. From high school on, most educated people think that their first drafts, aided by a sweep of the spell checker, are clear enough and correct enough to achieve their communication objective.

#### Style is NOT Cosmetic

The most frustrating thing for a technical communications consultant is to realize that most of one's clients consider editing a cosmetic activity, little more than prettying up the grammar and syntax. Too often, they do not realize that simpler is better. Indeed, most university-trained writers think that the more difficult and long-winded the text, the more "impressive" to the reader. And how can we blame them when so much of their IQ, SAT, and GRE scores depend on obscure vocabulary? When nearly every school writing assignment is expressed as a minimum length?

#### Robust Writing

Robust writing is crisp, clear text that engages the attention of reader and holds it. Its sentences are no longer than they need to be; its grammar as uncomplicated as possible. It uses words

familiar to the reader and explains, clearly, terms and ideas that are new.

#### Invisibility

*Robust writing is invisible to the reader.* The reader is unaware of the syntax and style, does not notice the word choice or paragraph structure, and certainly never stops to ponder a lapse of grammar or usage. Rather, robust writing creates the illusion that ideas are leaping directly, without friction or heat, from the writer to the reader.

#### Editing

Robust writing is the result of editing. (No first draft ever written meets the standard.) Any company that wants to win its fair share of proposals will insist that the nearly finished document be reviewed by a competent editor, someone who writes considerably better than the average college graduate, and *who is given enough time to edit and revise.*

## 9. You Overburdened Your Readers.

#### Readers

Engineers and technical professionals naively expect their proposals to be greeted eagerly and studied closely. If they make an important point, they expect it to be seen and understood—even if they've buried it in the middle of a long paragraph in a section full of long paragraphs. *To communicate successfully, however, it is best for the proposal writer to presume that the reader is inattentive, forgetful, error-prone, distrustful, and more likely to skim a passage than to read it closely.* Even if this view is too cynical, it is still a *useful* rule to make things as easy as possible for the readers/reviewers of the proposal.

#### Burden

*Effective writers try to reduce the burden on their readers.* It is not too much of a simplification to say that one style of writing is better than another if it communicates the same meanings with less effort for the reader. That is, good writers work harder so that their readers can work easier.

#### Holding Attention

Along with thematic titling, here are some other devices that lighten the reader's load:

- incorporating frequent summaries and overviews

- using lists and tables instead of paragraphs, when appropriate for the material
- assuring that charts and other exhibits can be seen when they are discussed, either on the same page or facing page (When readers are told to “ See Figure 1” they should be able to see it.)
- leaving lots of white space on the page, with frequent side headings, limiting the width of text columns to 5 inches (unless these practices are prohibited in the RFP)
- choosing readable typefaces and font sizes
- highlighting key words, phrases, and passages with italics, boldface, or other emphasis devices (used judiciously)

## 10. You Overprotected Your Document.

Tests	The purpose of a test is to find bugs, to make the thing being tested fail. But the natural inclination of a team of writers that have been at work all night on a frantically constructed proposal is to try to conceal its many flaws from the eyes of people who cannot appreciate how hard they have worked.
Testing and Love	Programmers cannot test their own code; architectural engineers cannot test their own designs; biologists cannot evaluate their own new drug applications. And, for similar reasons, successful proposal writers cannot—should not—edit and test their own proposals. Put simply, authors tend to fall in love with their own documents. When criticized they defend their shortcomings; when caught in an error, they make excuses.
Killer Team	Proposals must be really tested, that is, <i>read hard</i> by some one or group not associated with the writing team, readers whose mission is to misunderstand and find fault with the proposal, who do not have a parental fondness for its shortcomings. Some firms who use this technique call the final readers the “ killer team” or “

red team," or some similar name. Whatever it is called, even if it is one person, this final reading must be indifferent to the feelings and excuses of the authors, who must learn, over time, not to take it personally.



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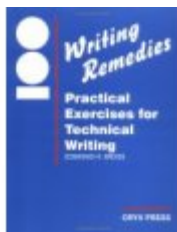


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