



BUSINESS

THE PERFECT PROPOSAL

Want the secret to wooing clients? It's not in your portfolio. According to this veteran designer and business writer, it's in your proposal. Here are his tips for crafting a good one.

In the old days, *Yd* lug my book around and do a dog-and-pony show with my work meticulously mounted to 16-inch-by-20-inch black boards. That's how they taught me to do it in art school. What they didn't teach me was how to whip up a proper proposal.

I can't remember the last time I showed my portfolio to a prospect. It's sitting in the corner gathering dust. What wins me work these days are my proposals. As a matter of fact, if I get to the point of presenting a proposal, nine times out of 10, 111 land the gig.

ILLUSTRATION BY ISABELLE CARDINAL www.igord.com

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Why? First, a lot of prospects come to me by way of referrals from my clients. Second, I'm pretty careful about taking on new clients that I know to be great matches with my business. **Third**, and most important, a properly crafted proposal is a potent tool to position me--and any designer--as an expert. It helps separate us from our pesky competitors by demonstrating our problem-solving, consultive approach to the prospect's communication challenge.

For a lot of designers, writing a proposal is wrought with angst. Where to start? What to include? Don't sweat it. I'll walk you **through** the process so you can draft powerful proposals that close the deal.

ASK THE RIGHT QUESTIONS

To begin, you'll need to know what kind of information to gather from the client and from your own research. That means having a questionnaire to help pull together info about your prospect's competitive arena, the audience background and the project's scope and goals. You can find several questionnaires to jump-start your inquiry in the Resources section at CreativeLatitude.com. Some of the questions you'll want to ask are:

- What's the primary message your prospect wants to convey to its audience?
- Who's the target audience?
- How does the company differentiate itself from competitors?
- What are three adjectives that describe how the prospect, and/or its product or service, should be perceived by the audience?
- What's the primary action your prospect wants the audience to take? For example, call for more information, learn something or make a purchase or donation.
- Will additional services, such as writing, photography and illustration, need to be procured?
- What's the budget for the project?

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That last question is important. If your prospect doesn't know, or worse, doesn't have a budget, it could raise a big, red flag. It often means the client hasn't thought things through, and that can spell trouble down the road. Perhaps your contact has never worked with a designer. If so, you may want to decline the project and let some other poor soul "train" him. Not sharing the budget can also mean the prospect sees design as a product and not a service. If that's the case, it may mean he's shopping for a design firm based on price and not quality. A savvy prospect will say something like, "We have X dollars for this project. What can we get for that?"

DO THE RESEARCH

After meeting with your prospect and picking her brain, you'll want to roll up your sleeves and get the scoop on what your prospect's competition is up to and so get a take on the audience.

Fire up your browser and check out competitor sites. Review any material that your prospect has provided or that you've found on your own. Where are the holes? What's good? What's bad? Where can you position your potential client for maximum impact? If applicable, call your prospect's vendors and suppliers. Ask for their perceptions about your potential client and some of their competitors. What do they like? What don't they like?

From this, you'll start to get a picture of the competitive environment. Document your findings. If there are things the competition's doing better, don't hesitate to tell it like it is. Your client needs to know, and you'll have the facts to back it up.

Next, look at the audience. Who are you talking to and what pushes their buttons? To find out, you can ask friends, family members and business associates who match the audience profile for their input and opinions. Cruise the web for forums and discussion groups where your audience may be hanging out. Ask your prospect for demographic info and search online for relevant facts about this target group, including their purchasing habits, activities and interests, and product preferences. Then, based on your findings, distill the audience down to a single, albeit fictitious, character. This "person" is the one you'll need to persuade.

START WRITING

Equipped with this market intelligence, it's time to put pen to paper (or fingers to keyboard). Typically, proposals are divided into the following 13 sections; I'll give you the scoop on each:

Executive Summary The Executive Summary is a one-to two-page overview of the entire proposal. It's also the last part of the document that you'll write. During the presentation, clients will usually look at either the summary or the budget first. It's your job to control that meeting and to strategically guide the prospects in the room as they review the proposal.

Current Situation This section is a recap of the prospect's existing business picture and why they've called

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you in. Demonstrate that you've thoroughly researched

nesses. For example, a proposal that we recently created for a web-design project included these not-so-positive assessments:

Although Client XYZ has a site in place, it's unfinished, resulting in a poor visitor experience and erosion of the brand. The key issues are:

- Most links are not functional.
- Overall design is outdated.
- Top navigation takes up too much screen real estate, resulting in most content falling "below the fold."
- The focus is on the company, rather than fulfilling the needs of the audience.
- There is no search-engine optimization in place, which results in poor search-engine rankings.

Project Goals Follow up the current situation analysis by showing how you'll solve the problem: the project goals. What the heck are you trying to accomplish?

This should be a no-brainer; you simply restate what you learned during your initial interviews with the client. Carefully review the project goals with your client to unearth and resolve any misunderstandings. Its better to address them now than to discover that you're totally off-base when you're 30 hours into the project.

Competition Here's where you'll regurgitate the nitty-gritty you learned doing your competitive research. Document what the client is doing poorly and note areas where they shine.

Audience This section is where you outline who the project will communicate to, what's important to them and what motivates them. You'll want to start or finish with a profile of a typical audience member--that fictional person you created who represents the entire audience.

Creative & Marketing Strategies This is where you'll trumpet your capabilities--without doing any layouts or other creative work. The idea here is to explain, in detail, what you plan to do--how you're going to meet the project goals and make the audience drool while scaring the heck out of the competition. Plus, you'll do it all while keeping within the budget and schedule. Boy, are you good or what?

Process This is where you explain all the things you have to do to make your client the bee's knees in their

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industry. Review every strategic, creative and production task **you'll** tackle from start to finish. **Detailing** your process demonstrates to the client what goes into a project. It helps get around the idea that graphic design is something anybody with a computer and some software can create with ease. It also helps to justify those fees you're about to quote.

Fees & Reimbursements This is the budget. The bottom line. List every task and assign a dollar figure. If you need help, visit the Resources section at CreativeLatitude.com and download the estimating spreadsheet.

Be sure to give yourself some breathing room. Always, always, always under-promise and over-deliver. If you do this, you'll be the knight in shining armor. As a rule, add 20% to the budget to cover yourself; projects always take longer than you expect.

Billing, Schedule and Copyrights This is the section where you'll lay out the production schedule, along with how and when you get paid. You'll also want to cover copyright issues. What rights will you transfer to the client and what will you retain? This section should also include a provision that says you can use the work for self-promotion and show it in your portfolio.

Conclusion This is the first cousin to the Executive Summary. It should be a recap of what you're going to do and why your client is utterly brilliant for choosing you over your competition.

In many ways, your proposal should follow the rule of thumb for speaking engagements: Tell them what you're going to tell them (the Executive Summary), tell them (the body of the proposal) and finally, tell them what you told them (the Conclusion). Doing so helps ensure that the information is clear and memorable.

Company Overview, Clients & Awards This final section is where you'll talk about your firm's background, clients you work for, awards you've won, etc. tout all your experience and show the client that you're right for the job. You may want to include some client testimonials to back up your egocentric ramblings.

Finally; don't skimp on the presentation. Be sure to create a great cover and table of contents, print the pages on quality paper and package it all together with an attractive binding. Provide copies for each person at the meeting.

And there you have it. Piece of cake, no? Follow this prescription and you'll be whipping out professional proposals that will meet or beat your competition every time. Beyond this, a killer proposal helps to position you as a professional with both the creative and business skills to get the job done. Your potential client will be bowled over--and you'll be smilin'. **HOW**

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