

17: Business Reports - Part 2

Chapter Objectives

The purpose of this chapter is to:

- Define business proposals
- Explain the purpose for writing proposals
- Explain the differences amongst audiences for proposals
- Explain the main sections to include in a proposal
- Analyze the importance of using references in a proposal
- Incorporate the voice and tone in business proposals

The Purpose of Business Proposals

An effective business proposal informs and persuades its target audience that action must be taken to improve a situation. It features many of the common elements of a report, but its emphasis on persuasion guides the overall document.

The audience for a proposal can be external and internal. **External audiences** do not work for the same business as the writer of the proposal. External audiences work for another company and will answer a **Request for Proposals** (RFP) sent by a company that needs work completed, but does not have specialized employees on staff who can complete the work. **Internal audiences** work within the company and will answer an indirect RFP from a department or unit.

If you have been asked to submit a proposal it is considered **solicited**. The solicitation may come in the form of a direct verbal or written request, but normally solicitations are indirect, open-bid to the public, and formally published for easy access. An RFP, **request for quotation** (RFQ), and **invitation for bid** (IFB) are common ways to solicit proposals for business, industry, and the government.

Here is an example of how an RFP works for external audiences:

Mercy Hospital needs to expand and is going to construct a new wing. Hospital administrators decide to put out a RFP so that various businesses will submit bids to construct the new wing. The RFP does not have to stop with construction. Everything from office furniture to bedpans could potentially be put out to bid, specifying cost, quantity, quality, and time of delivery required. Janitorial services may also be bid on each year, as well as food services, and even maintenance. Using the power of bidding via an IFB to lower contract costs for goods and services is common practice.

IRBs are often job-specific in that they encompass a project that requires a timeline, labor, and materials.

Here is an example of how an IRB works for external audiences:

If board members of a local school district announces the construction of a new elementary school, they normally have the architect and engineering plans on file, but need a licensed contractor to build it.

When the writer of and the audience for the proposal work for the same company, the proposal is internal. Here is an example of how a proposal may work for an internal audience:

You are the media specialist for Immediate Enterprises. Based on customer feedback data, you want to implement a new procedure for improving customer service. To share the situation, solution, data, research, scope, and timeline, you write a proposal to your supervisor.

Unsolicited proposals are the “cold calls” of business writing. They require a thorough understanding of the market, product and/or service, and their presentation is typically general rather than customer-specific. They can, however, be tailored to specific businesses with time and effort, and the demonstrated knowledge of specific needs or requirement can transform an otherwise generic proposal into an effective sales message. Getting your tailored message to your target audience, however, is often a significant challenge if it has not been directly or indirectly solicited. Unsolicited proposals are often regarded as marketing materials, intended more to stimulate interest for a follow-up contact than make direct sales. Sue Baugh and Robert Hamper (1995) encourage you to resist the temptation to “shoot at every target and hope you hit at least one.” A targeted proposal is your most effective approach.

Common Proposal Elements

Solution

In a proposal, a **problem** is a question posed for considering, solving, or answering. In order to solve the problem, you must provide support that a problem exists and that it is worth solving. In order to support a solution to a problem, you need to write an effective statement of the problem. Effective business proposals are built around a great solution or idea. While you may be able to present your solution in an interesting way, you want your document and its solution to stand out against the background of competing proposals or maintaining the status quo. What makes your idea different or unique? How can you better meet the needs of the company than other vendors? If the purchase decision is made solely on price, it may leave you little room to underscore the value of service, but the sale follow-through has value. Business proposals need to have an needed idea or solution in order to be effective.

Traditional Categories

You can be creative in many aspects of the business proposal, but follow the traditional categories. Business associates expect to see information in a specific order, much like a résumé or even a letter. Each aspect of your proposal has its place and it is to your advantage to respect that tradition and use the categories effectively to highlight your solutions. Every category is an opportunity to sell, and should reinforce your credibility, your knowledge, your passion, and the reason why your solution is simply the best.

The format of a business proposal often depends on the style guide or format implemented by the company. However, customary sections for the body of a proposal include:

Cover Page: Title page with writer's name, title, date, and specific reference to request for proposal, if applicable.

Executive Summary: Like an abstract in a report, this is a one- or two-paragraph summary of the product or service and how it meets the requirements and exceeds expectations.

Background: Discuss the history of your product, service, and/or company and the problems that have developed over time. Consider focusing on the relationship between you and the potential buyer and/or similar companies to solve the situation.

Proposal: The idea. State and discuss the problem. Who, what, where, when, why, and how are the questions that must be answered. Make it clear and concise. Don't waste words, and don't exaggerate. Use clear, well-supported reasoning, with details, to demonstrate your product or service.

Market Analysis: What currently exists in the marketplace, including competing products or services, and how does your solution compare?

Benefits: How will the potential buyer benefit from the product or service? Be clear, concise, specific, and provide a comprehensive list of immediate, short, and long-term benefits to the company.

Timeline: A clear presentation, often with visual aids, of the process, from start to finish, with specific, dated benchmarks noted.

Solution section: Discuss the solution. Since your problem is unique, the research will not present the solution to your problem. However, the research will discuss similar problems and the solutions to these problems. This research will provide you information with which to formulate a solution that is relative to your specific problem.

Research section: Research your topic. Your sources must be current for trends, within the last 2 or 3 years. Therefore, you need to research journals or newspapers for published articles, published interviews, published speeches, etc. You may use books for historical information or information that hasn't changed over time.

You will need at least three or four documents that address a problem similar to the one that exists. Although you will not find your exact situation/problem, you will find documents that refer to similar problems. These documents will have similar populations, environments, workforces, etc. For example, if you propose to implement a shuttle bus service from the parking lot to the office site for a more efficient and effective way for employees to report to work, you may find documents from other workplaces, with circumstances similar to yours, who experienced similar problems and solved them by providing shuttle bus services.

The research will provide you with information that validates your topic as a problem and your solution, as well as validating your proposed implementation, methods of operation, costs, and benefits.

Implementation section: Tell when, why, and how the solution will be used for the first time. The implementation period is usually a trial period to see if the solution is feasible as planned. Thus, you will pick a time that does not impact the normal operation of existing programs/patterns of operation/etc. In addition, describe the location of implementation, who will be involved,

costs of implementation, what is expected to happen, the date and time of implementation, the duration of implementation, etc. Explain also why you chose this time for implementing the solution. State that during this time you will note what works and what needs to be changed.

Methods of Operation section: This section will tell how the solution will fit into and be used as a functional part of the day-to-day operation of the company/business, etc. Detail the date you expect to launch the solution into the operation the company, the place from where the solution will operate, how it will operate, and who will be involved (identify their responsibilities, duties, and any titles, certifications, degrees, etc, needed).

Costs section: This section tells how much the solution will cost. Detail the cost in dollars and cents. Discuss the costs associated with implementing the product or service and extended financial plans.

Benefits section: This section explains the benefits of the solution. There is little reason why your proposal should be accepted if there are not meaningful benefits. Thus, be sure to show that your solution will result in substantial benefits for the organization, company, etc.

Conclusion: Like a speech or essay, restate your main points clearly. Tie them together with a common theme and make your proposal memorable.

Reference page: The reference page is a separate page that references your research in the in-text parenthetical citations.

Appendices: The Appendices include the full summaries and responses, the Problem Analysis, and any information that is meaningful to the proposal.

Keep in mind that formatting may vary. A business or organization may even provide a template they want writers to use or specify what components they expect to be covered in the proposal. However, if they don't, then follow the suggested format above.

Using Persuasive Appeals in Proposals

The term *persuasion* refers to using words and their meaning to convince the audience to believe, understand, and respond to information as intended. A message depends on three persuasive appeals: ethos, pathos, and logos.

Ethos refers to credibility. **Pathos** refers to passion and enthusiasm. **Logos** refers to logic or reason. All three elements are integral parts of your business proposal. Your credibility may be unknown to the potential client and it is your job to reference previous clients, demonstrate order fulfillment, and clearly show that your product or service is offered by a credible organization. By association, if your organization is credible the product or service is often thought to be more credible.

In the same way, if you are not enthusiastic about the product or service, why should the potential client get excited? How does your solution stand out in the marketplace? Why should they consider you? Why should they continue reading? Passion and enthusiasm are not only communicated through “!” exclamation points, which should be excluded from formal business documents, including proposals and report. Your thorough knowledge and your demonstration of that knowledge, communicates dedication and interest.

Each assertion requires substantiation and each point requires clear support. It is not enough to make baseless claims about your product or service. You have to show why the claims you make are true and relevant. Make sure you cite sources and include a signal phrase such as “according to” to indicate the information that follows is from a reliable source. Doing so increases your credibility.

Composing Clear and Concise Proposals

A clear and concise professional document is a base requirement. If it is less than professional, you can count on its prompt dismissal. There should be no errors in spelling or grammar, and all information should be concise, accurate, and clearly referenced when appropriate. Information that pertains to credibility should be easy to find and clearly relevant. If the document exists in a hard copy form, it should be printed on a letterhead. If the document is submitted in an electronic form, it should be in a file formatted to your company's standards. Use a widely use software to compose the proposal. A portable document format (PDF)—a format for electronic documents—may be used to preserve content location and avoid any inadvertent format changes when it is displayed.

Use a reporting and explanatory voice throughout the proposal. You may use first person pronoun “I” sparingly in the introduction and conclusion if you will perform specific tasks; this is acceptable because you are explaining what you accomplished or plan to accomplish. Provide the advantages and benefits of your solutions.

Emphasizing Key Components for Proposals

In order to be successful in business and industry, you should be familiar with the business proposal. Much like a report, with several common elements and persuasive language, a business proposal makes the case for your product, service, or solution. Business proposals are documents designed to make a persuasive appeal to the audience to achieve a defined outcome, often proposing a solution to a problem.

General Proposal Writing Tips

When you develop a proposal, go through this checklist to determine whether the draft meets the needs of the audience.

Who is your audience?

What objectives can you expect your reader to have?

Audience: Describe the intended audience of the proposal and the proposed report (they may be different) in terms of the organization they work for, their titles and jobs, their technical background, their ability to understand the report you propose to write.

What are your purposing in writing?

What aspects of the situation may affect reader response (dedication, time, money, work conditions)?

Situation: Describe the situation in which the proposal is written and in which the project is needed: What problems or needs are there? Who has them? Where are they located?

Deliverable type: Describe the deliverable that you are proposing. If you are writing a research proposal, have you provided the audience with a technical background/history section?

What information must your message include?

How can you build support for you position?

Information sources: Make sure you know that there is adequate information for your topic. List specific books, articles, reference works, interview subjects, field observations, and other kinds of sources that you think will contribute to your report.

Graphics: List the graphics you think your report will need according to their type and their content.

All links live as of July 2021.

References

Baugh, L. S., & Hamper, R. J. (1995). Handbook for writing proposals (p. 3). New York, NY: McGraw-Hill.

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