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The Formula for Custom Proposal Writing

case studies

<https://unstrategic.com/writing-good-web-proposals/>

description

estimate

scope of work

process

research

cost

risk

TEAM STRUCTURE

problem

assumptions

RISK

goals

summary

budget

template

approach

methodology

TIMELINE

benefits

objectives

ideas

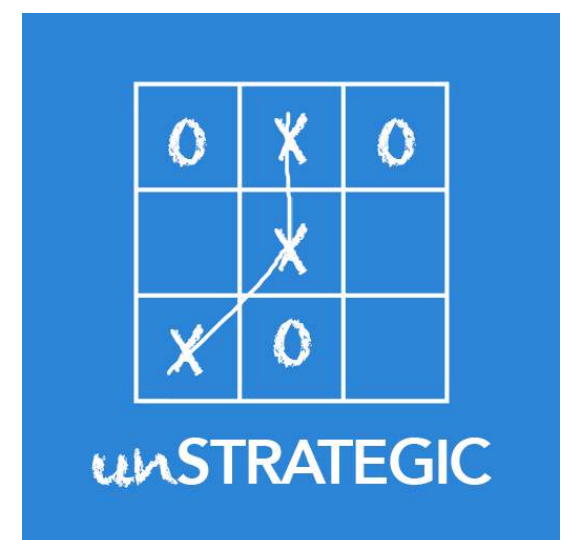
implementation

options

design

framework

project



Custom Proposals





What are the benefits of custom proposal writing?

- 1 Shows quality work
- 2 Makes you look more professional
- 3 Makes you stand out from your competitors
- 4 Eventually leads to bigger clients; higher dollar deals

ASSUMPTIONS

YOU'VE DONE HOMEWORK

NATM, NBAT, BANT, WHATEVER

-  Needs
-  Authority
-  Timeline
-  Budget



**SCOPE
THE
PROJECT**

Proposals should...

- 1 Have a good user experience
- 2 Focus on content then presentation
- 3 Be flexible

Become your reader, become your recipient. What would you want to read about?

What type of proposals should I write?

Text-heavy

Project Proposal

September 1

Adam Lamagna
Strategist
September 1, 2016

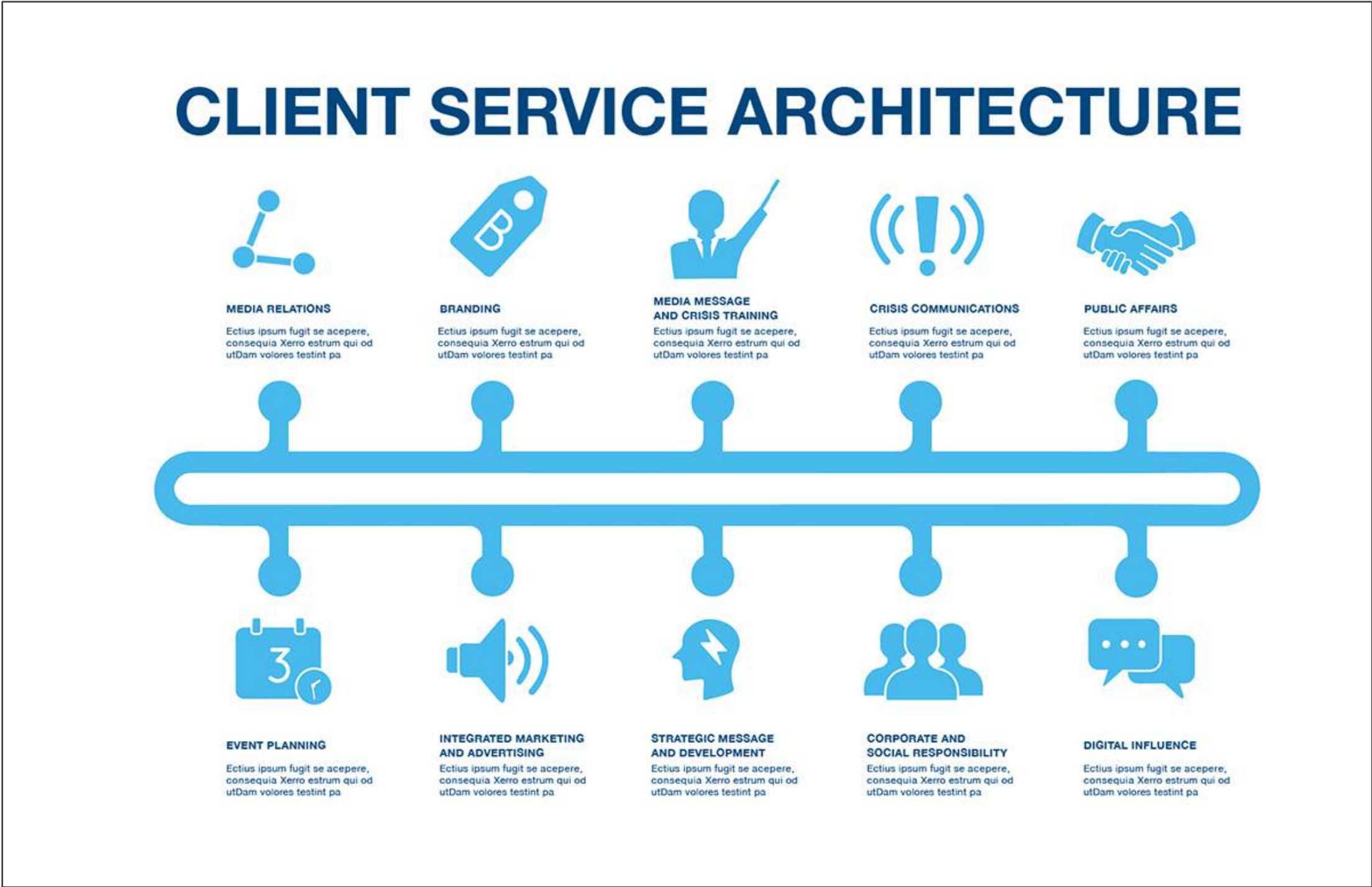
Intro

Lorem ipsum dolor sit amet, ligula suspendisse nulla pretium, rhoncus tempor placerat fermentum, enim integer ad vestibulum volutpat. Nisl rhoncus turpis est, vel elit, congue wisi enim nunc ultricies sit, magna tincidunt. Maecenas aliquam maecenas ligula nostra, accumsan taciti. Sociis mauris in integer, a dolor netus non dui aliquet, sagittis felis sodales, dolor sociis mauris, vel eu libero cras. Interdum at. Eget habitasse elementum est, ipsum purus pede porttitor class, ut adipiscing, aliquet sed auctor, imperdiet arcu per diam dapibus libero dui. Enim eros in vel, volutpat nec pellentesque leo, temporibus scelerisque nec.

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Visual-based



NO FLUFF

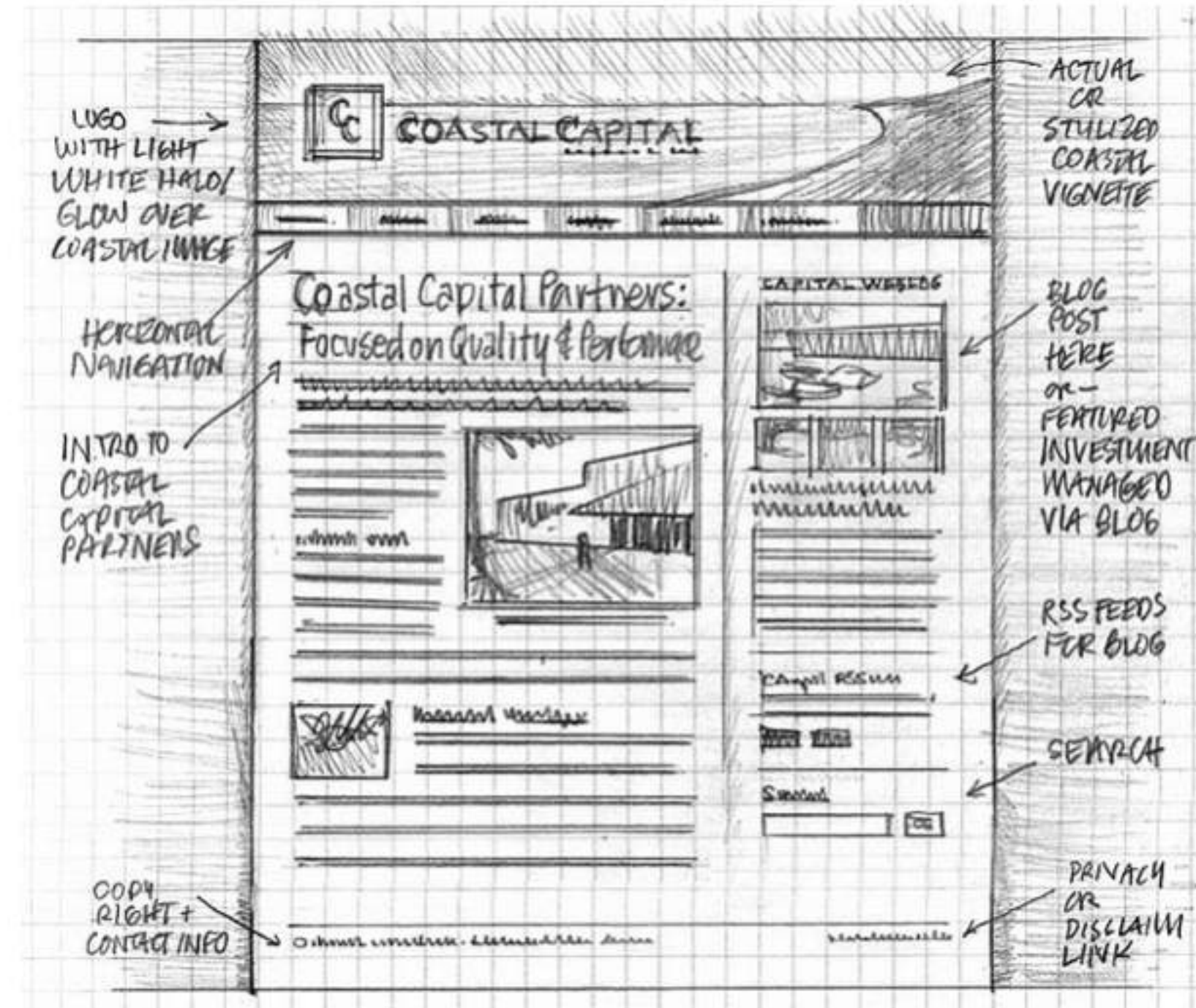


never judge a proposal by its cover...

Hello XYZ...and Welcome!

WEBSITE REDESIGN PROPOSAL

COASTAL CAPITAL



Web Project Proposal

Prepared for: Thomas Thompson, Project Manager

Prepared by: Adam Lamagna, Strategist

September 24, 2016

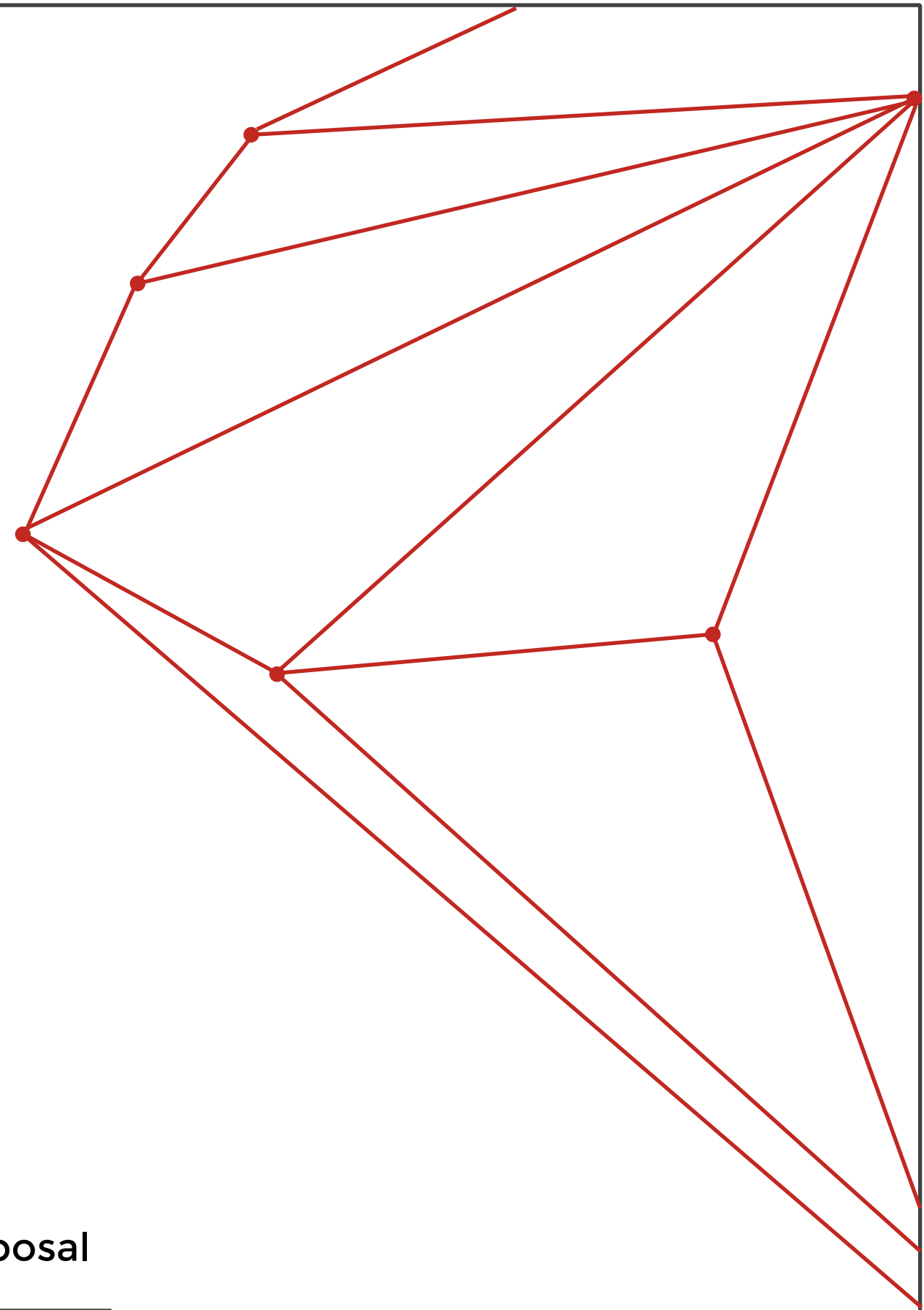
Proposal number: 617-634-9857



Greetings from Your City



Adam Lamagna
Web Strategist
September, 2016



Content Strategy Proposal



Bridging the gap between the digital and the human.

Adam James Lamagna
Strategist, Agency
10.01.16



Landmark Proposal

Adam Lamagna
Web Strategist
September, 2018



Project Proposal
Adam Lamagna
Web Strategist
September, 2016

table of contents

FORMULAS

Table of Contents

- 1 Give insight into the upcoming sections
- 2 Get people excited by using their terminology

Inform your reader, entice your reader.

Table of Contents (that has worked for me)

- 1 The Intro
- 2 The Research Analysis
- 3 The Rundown
- 4 Scope of Work (w/ or w/o options)
- 5 Timeline & Investment
- 6 Ideas

Attachment

About Us

Case Studies

The Kicker

Info Page



INTRO

SHORT
ARTICULATE
AUTHENTIC

Excitement

Acknowledgment

Intro

Experience

We're thrilled to be considered for **Your Company's New Website Project Initiative** and excited for the potential collaboration.

We have been creating and building beautiful web experiences that engage their prospective users and leave lasting impressions. We've worked with similar brands including **Industry Company** and **Vertical Organization**, and understand the challenges that you face when it comes to your digital properties and presence. We believe we can bring significant success to your business and the way it's viewed online with the solutions we've outlined.

We feel we have the right skills to partner with a **Business such as Yours** that leads the way in **Your Vertical**. Your dedication to **your area of expertise** has inspired us to provide a unique and tailored solution which we will demonstrate in the pages to come. But first, we'd like to talk a little about the opportunity that we see here to build something remarkable within **Your Industries** digital world.

While our potential work moving forward will focus on deliverables and objectives like creating a flawless user interface and increasing user engagement, being successful in this endeavor requires so much more. It's making your audience's user experience seamless in every way, from the **abc component of your website** to the **xyz integration with known third party**. This **Website Project Initiative** is our opportunity to create something not just useful for you users, but memorable so they keep coming back, and meaningful so it moves them to action.

We're happy to unveil our approach for this **New Website Project** that involves creating user personas, storytelling, audience engagement, and first-class technical integrations. Again, we are very delighted to be a part of this process. It's with great pleasure we present to you our ideas and would be happy to discuss the particulars further. We hope you enjoy this custom proposal specifically designed for **Your Company**.

Recognition

Assurance

THE RESEARCH ANALYSIS

UNDERSTANDING THEIR PROBLEM WITHIN THE CONTEXT OF THEIR WORLD



The Research Analysis

- 1 Research the prospect; business/website
- 2 Research their competitors
- 3 Research the best in the business
- 4 Take a look at what people are saying

This is designed to let your prospect know that you understand their challenge within the context of their environment.



YALE UNIVERSITY
Content rich



DUKE UNIVERSITY
Emphasis on video



We took some time to explore...



HARVARD UNIVERSITY
Image based

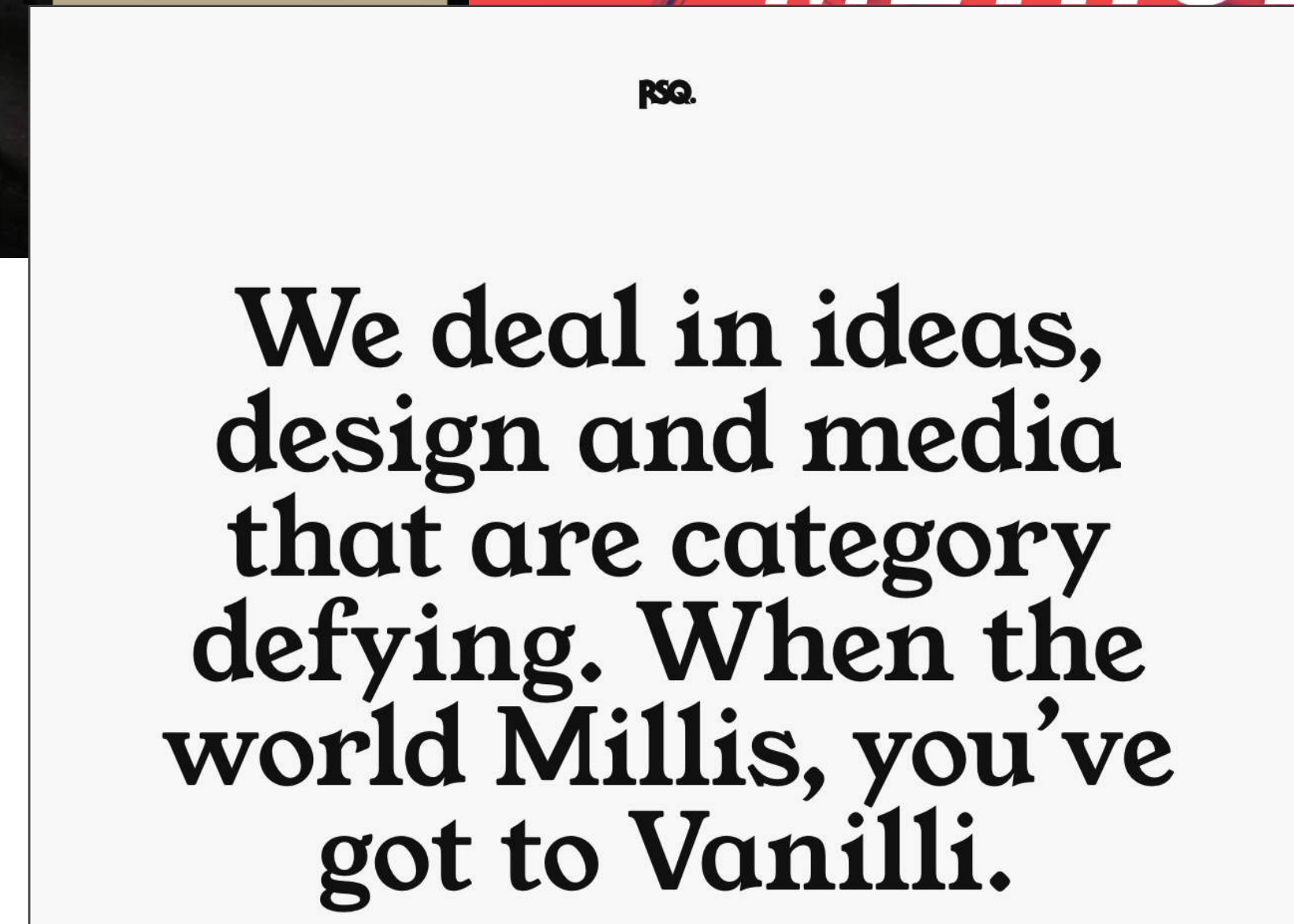
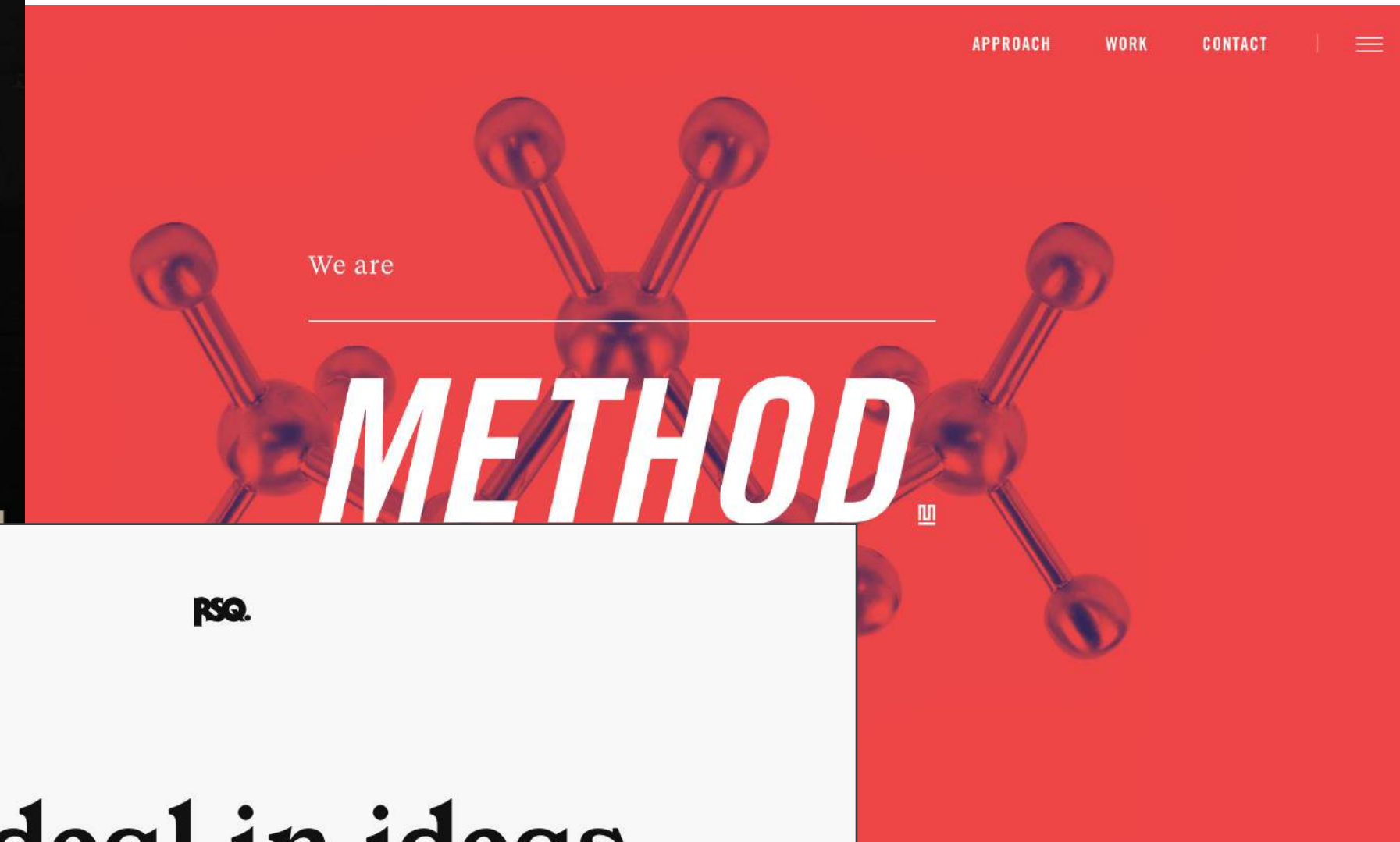


HIGHER ED CHALLENGES

In today's competitive educational landscape, institutions are pressed with catering to a wide audience base that includes content-junkie incoming enrollees, tech savvy current students, and alumni of all ages.

FOCUS ON CONTENT

Universities cut from the same cloth seem to be leading the way in areas of content creation and storytelling. Focusing on content helps connect to a wider audience. We think spending some time creating a content strategy that meets the demands of your atmosphere in the higher ed space would be well worth the effort.



Scoping the competition

We took some time to scope out the agency landscape. Knowing what other web firms are doing right now in this fast-paced environment is a crucial step in creating and building your digital presence.

Our gut reaction to the top agency websites in terms of design were that of true culture elucidation. You can tell by the layout and arrangement, whether text-based or image-rich, these agencies invested massive effort in conveying their culture through digital expression.

Your brand identity should lie within the pages of your website; in every image that's displayed, in every color that leaps from the screen, in every bit of code that powers your brand.



FOUNDATION SOCIAL MEDIA

We took some time to explore your social media to see how engaged your users are. Here's what we found.



Metric Dashboard Help

Share... ▾

Export... ▾

	Conversation rate↓↑	Amplification rate↓↑	Applause rate↓↑	Economic value↓↑	Posts↓↑	Comments↓↑	Shares↓↑	Likes↓↑
Twitter	0.074	0.94	1.01	—	94	7	88	95
Facebook	0.34	2.41	9.06	—	32	11	77	290
YouTube	0.00	0.00	0.00	—	0	0	0	0

SOCIAL CHANNEL:

FACEBOOK

For the Foundation, Facebook is their most engaged social media channel. However, they do seem to be much more active on Twitter than XYZ, but engagement for both Twitter accounts is similar.

ENGAGEMENT THIS PAST MONTH:

POSTS: 32

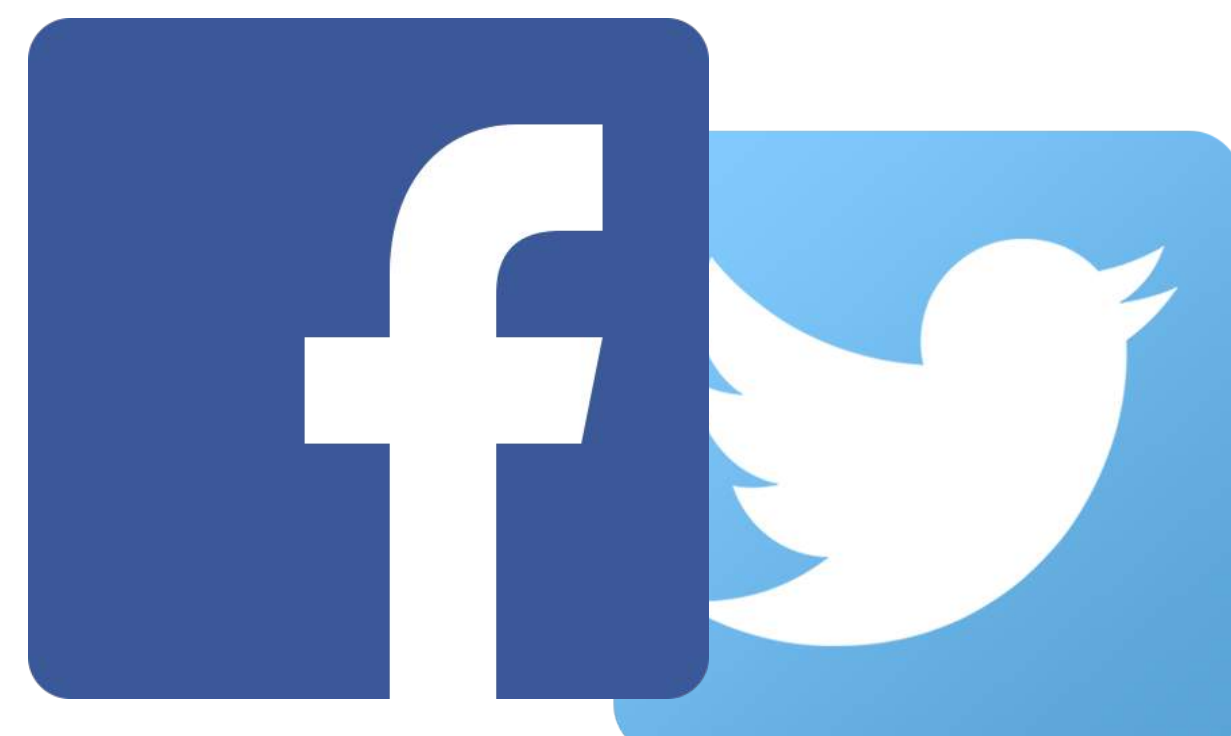
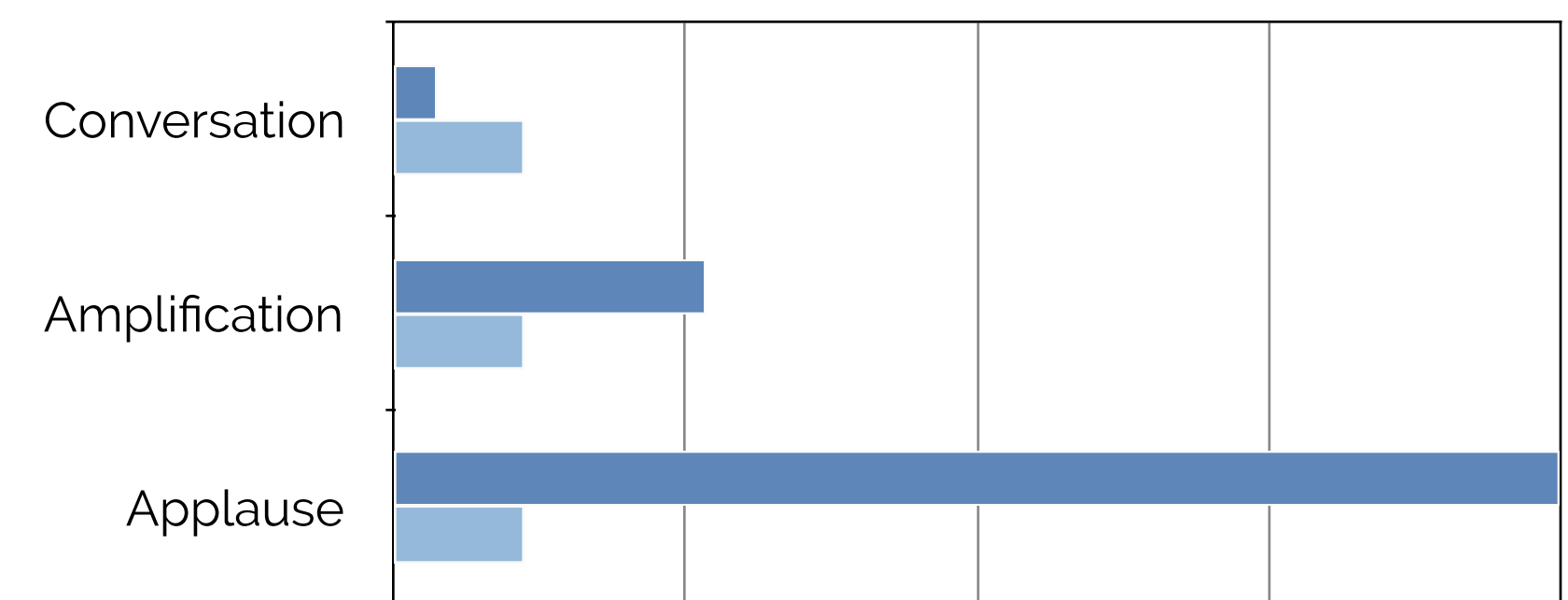
COMMENTS: 11

LIKES: 290

SHARES: 77

Number of Posts

Factor per 1 Post





THE RUNDOWN

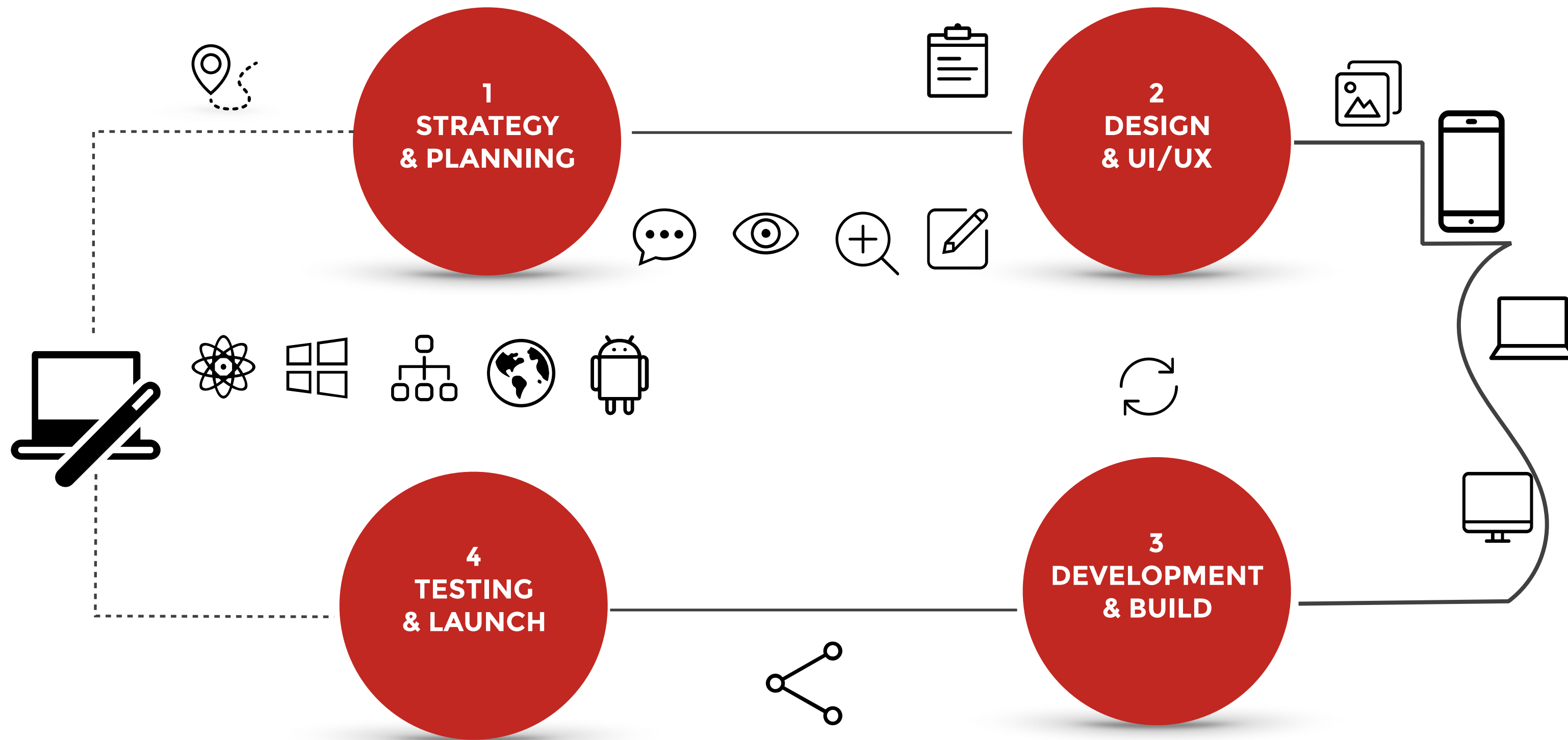
Cut to the Chase

The Rundown

- 1 Proven approach, methodology, or process
- 2 Understand objectives, outputs, outcomes
- 3 Working style and collaboration

This section can be filled with whatever you'd like the recipient to know that isn't in the Scope of Work section.

Concentrate on the outcomes, not just the activity, sell that value and attach meaning for the reader.



1. STRATEGY & PLANNING - Our learn phase is designed to gather knowledge on your company, your audience, and more. Deliverables from this phase, which include user persona definition, can be leveraged in other areas of your business, not just on the website.


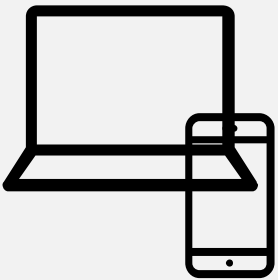
2. DESIGN & UI/UX - We'll uncover the right design for your users through design thinking, empathy, creativity, and rationality. The design phase will produce digital standards that will act as a starting point for the creation of other materials in-house.

3. DEVELOPMENT & BUILD - Our development teams will produce a white site prototype to get you working with the content management system right away. Our goal is to get to an effective, polished deliverable that meets the ever changing needs of your editorial team, which is produced from your early participation.

4. TESTING & LAUNCH - We ensure our level of testing meets the standard of the most recent browsers and devices. Testing, although seen as a hindrance, is important to the overall identity of your brand. We'll ensure smooth features and functionality so users have the best experience possible.

Approach Overview


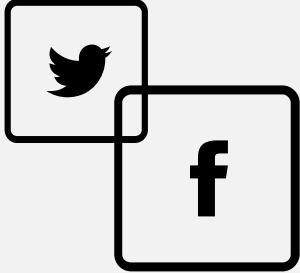




MODERNIZE DESIGN

Update the look of design to be responsive and user-friendly.



01
ACTIVITY



USER ENGAGEMENT

Appeal to a wider audience using different devices


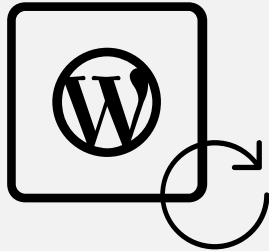
01
OUTCOME



MIGRATE TO WORDPRESS

Update the CMS from a homegrown system to the open source platform WordPress.


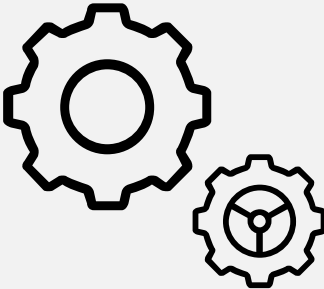
02
ACTIVITY



EASE OF USE

Improve the standard of content creation and dissemination for your internal editorial team.


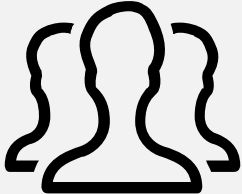
02
OUTCOME



INTEGRATIONS

Integrate 3rd party software for completion of web based features.

03
ACTIVITY



USER EXPERIENCE

Provide a robust and seamless experience for your users.

03
OUTCOME

ACTIVITIES

OUTCOMES

WE USE SOME GREAT TOOLS

BASECAMP

Basecamp will be used as our Project Management Tool, all files/deliverables relating to the project will be housed here.

GOOGLE DRIVE

Google Drive will be used to collaborate and to sign-off on any deliverables

GOOGLE HANGOUT

Hangout will be used to have weekly status updates and working sessions to cut down on the back and forth.



GIVING EVERY CLIENT THE ATTENTION THEY DESERVE

Communication means a great deal to us, we will be in constant contact with your team every step of the way so you know exactly what's going on and when it's going to happen. Transparency is extremely important to us.

WEEKLY:

Weekly working sessions where our teams will collaborate on project issues.

MONTHLY:

In-person meetings to discuss designs, deliverables, and ongoing strategy consultations. We want you to be involved.

scope of work

The Scope of Work (with or w/o options)

- 1 Project Overview
- 2 Tasks
- 3 Deliverables

The Scope of Work will be different for everyone. You don't have to go into a lot of detail, you just need to highlight the different areas of the project

Scope (trajectory)

- 1 Strategy
- 2 Design
- 3 Technical
- 4 Ongoing

The sections of a scope of work are usually similar across different agencies at a high-level; start with these sections

SCOPE OF WORK:

PROJECT OVERVIEW:

Client has engaged the Agency to execute the XYZ design and development of their main .org website. Requests include user personas, user journeys, flowcharts, content creation and development, design and development of the website, testing and launching, and ongoing support, maintenance and enhancements for one year following life after launch.

TASKS:

Using our proven methodology and approach, Agency will complete the following task in order to launch a successful project and product.

We will complete an in-depth discovery of:

- Business/Objectives/Metrics for Success
- Current Websites likes/dislikes
- Analytics Trends
- Evaluate Content Types/Material
- User Personas discussion
- Design & UX / Creative Ideas / Objectives
- Technology Platforms
- Systems Integrations & 3rd Parties
- Stakeholder Interviews

DELIVERABLES:

After Discovery we will complete the following deliverables for review by your leadership team

Deliverables will be, but may not be limited to:

- Discovery & Strategy
 - One full-day workshop
 - 5 stakeholder interviews at one hour each
 - Discovery Findings document outlining a strategic engagement

Option 1

SCOPE OF WORK OPTION 2

DISCOVERY & PLANNING

INFORMATION ARCHITECTURE, UX, DESIGN

BUILD & DEVELOPMENT

DESIGN OVERVIEW

Client has engaged the Agency to execute the XYZ design and development of their main .org website. Requests include user personas, user journeys, flowcharts, content creation and development, design and development of the website, testing and launching, and ongoing support, maintenance and enhancements for one year following life after launch.

TASKS

Using our proven methodology and approach, Agency will complete the following task in order to launch a successful project and product.

We will do the following:

- IA, UX, Design
 - Information Architecture definition
 - Treejack user test
 - Wireframes
 - Style Tiles
 - Mockups of key pages outlining content boxes, CTA's, image-placement, etc.
 - Template Design
 - Up to XX amount

DELIVERABLES

- Discovery & Strategy
 - One full-day workshop
 - 5 stakeholder interviews at one hour each
 - Discovery Findings document outlining a strategic engagement
- IA, UX, Design
 - Refined Information Architecture
 - 2 Treejack tests to confirm
 - Up to XX amount of wireframes
 - 2 rounds of comprehensive edits
 - Up to XX amount Style Tiles
 - 2 rounds of comprehensive edits
 - Key page fully designed mockups

Option 3

1. DISCOVERY & STRATEGY

Planning

During this process we will ensure up to 3 discovery sessions which will be used as the basis for our the starting point. It is our process of discovery that will enable us to look at all aspects of your business and insert our teams into your culture for optimal understanding. We our consultants first and will fully understand your business model.

Activities may include the following, but are not limited to:

- Generative research - analytics and social media
- Project objectives and success metrics
- Target audience discussion
- Mapping user flows
- Branding & Logo discussions
- Website likes and dislikes
- Content inventory
- Technical integration assessment

DELIVERABLES

- Project Summary Deck
- User Stories
- User Flows
- Defined User Personas
- Finalized Budget & Timeline

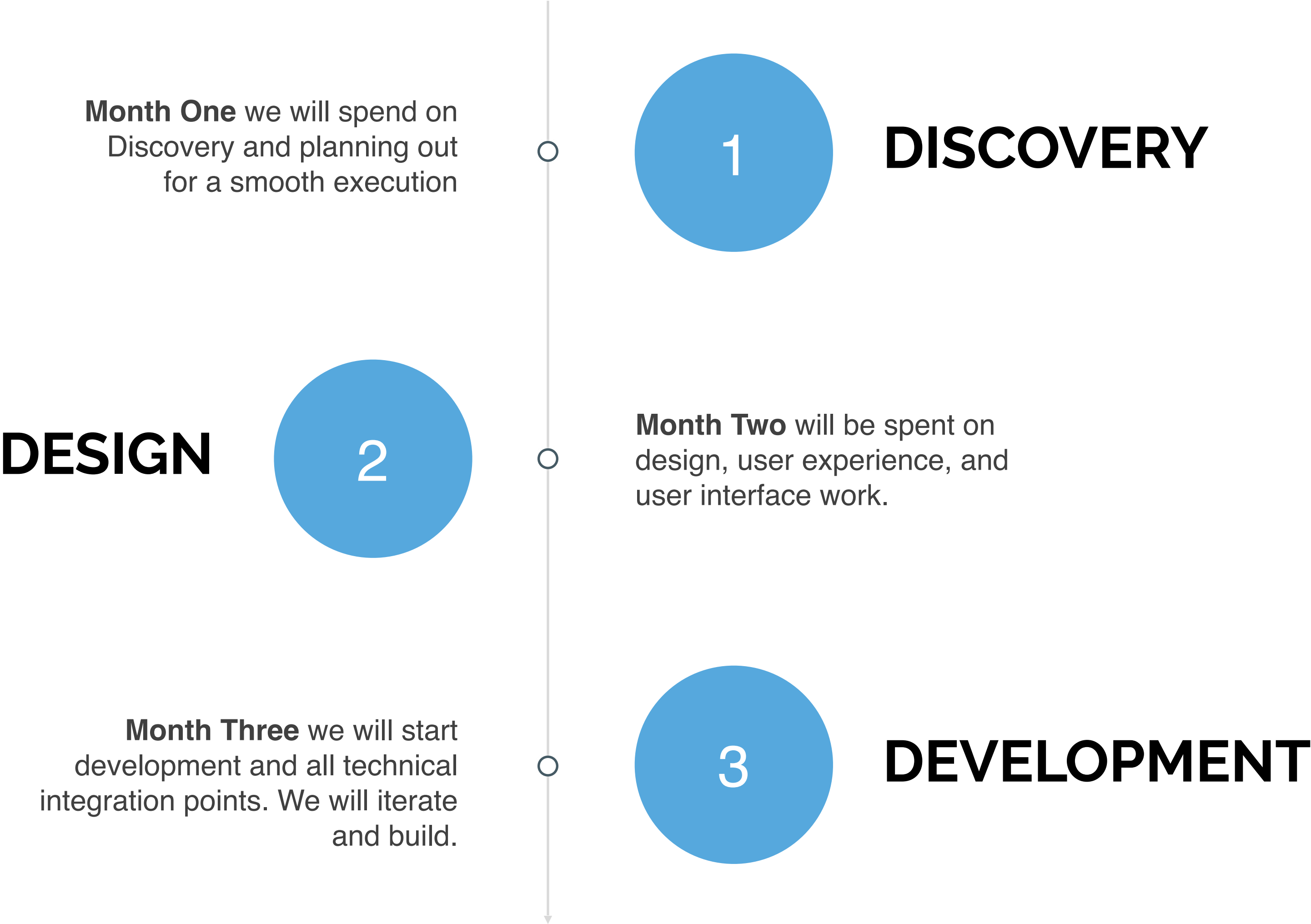
If you give your prospect options, you compete against yourself.

If you give your prospect one option, you compete against everyone else.

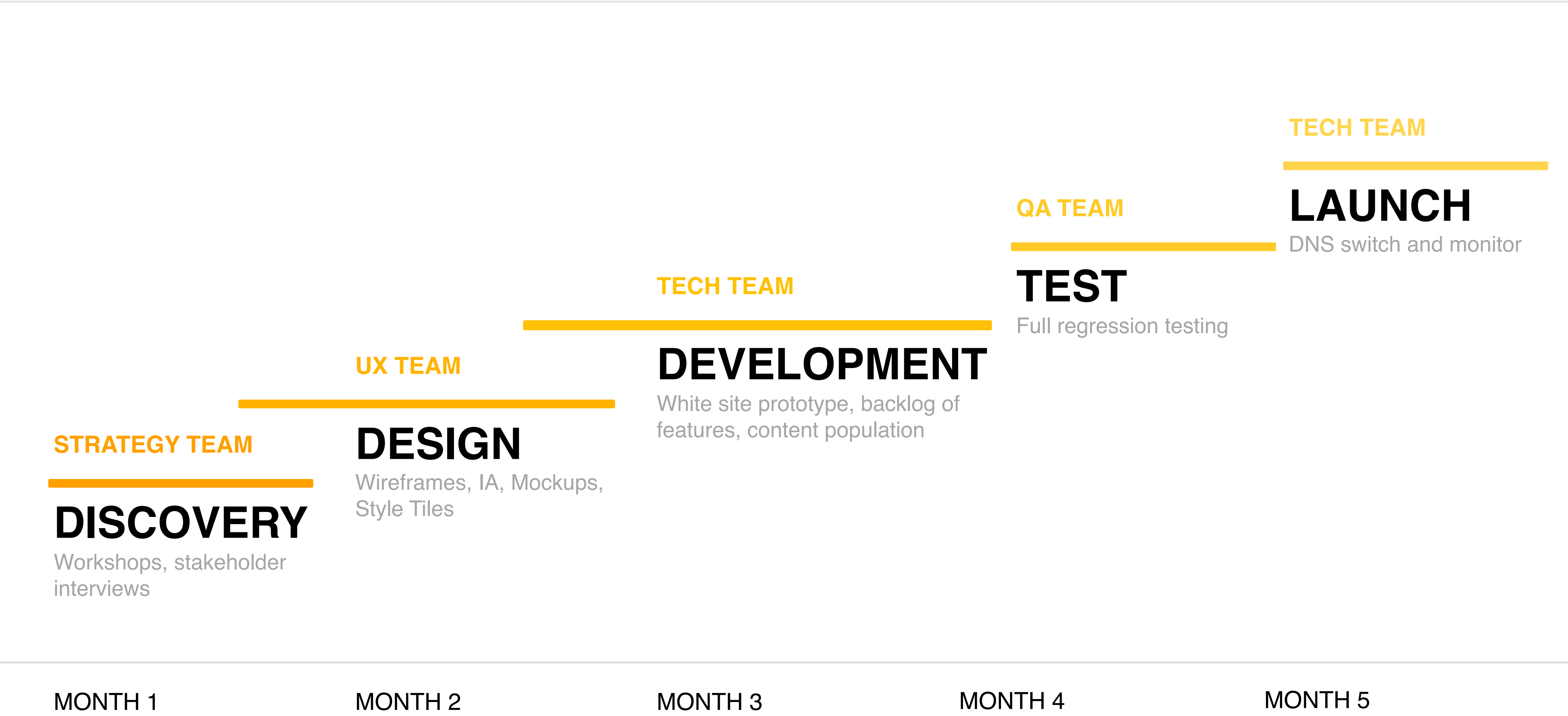
timeline

PRETTY STANDARD, YEAH?

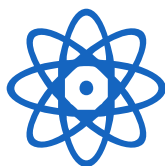
TIMELINE VERTICAL



TIMELINE OVERVIEW



investment all depends!
Flat Rate / Time & Materials / Value-based
JUST MAKE IT TIERED TO GO WITH YOUR OPTIONS!



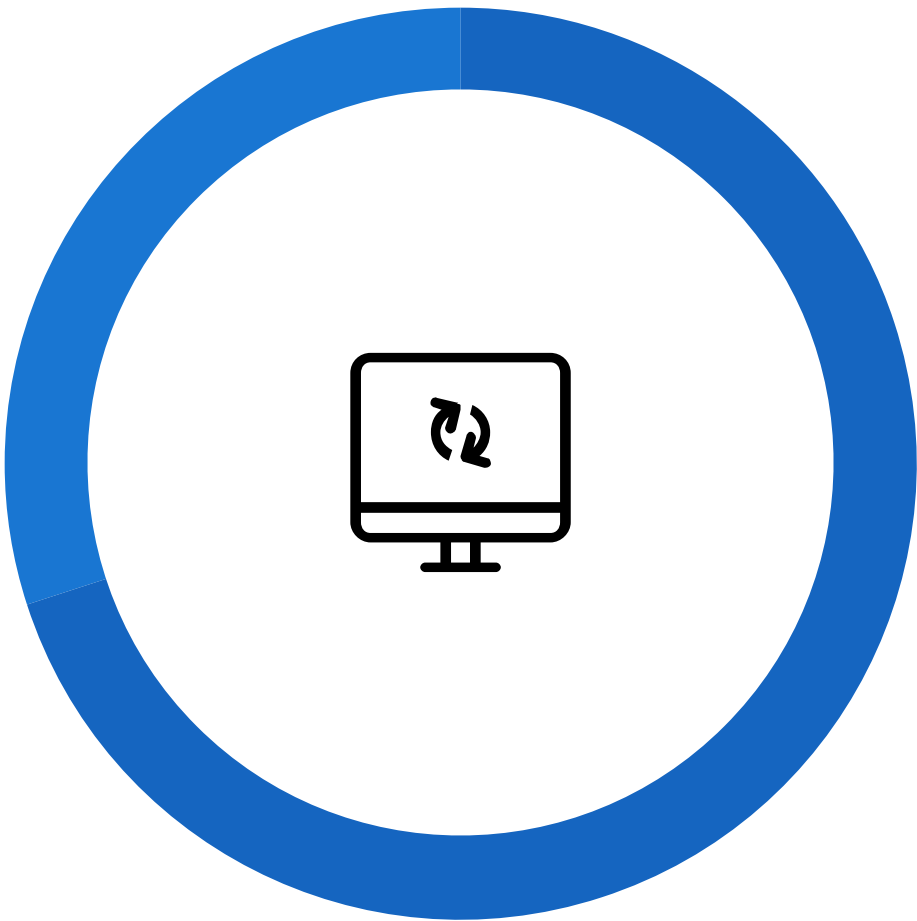
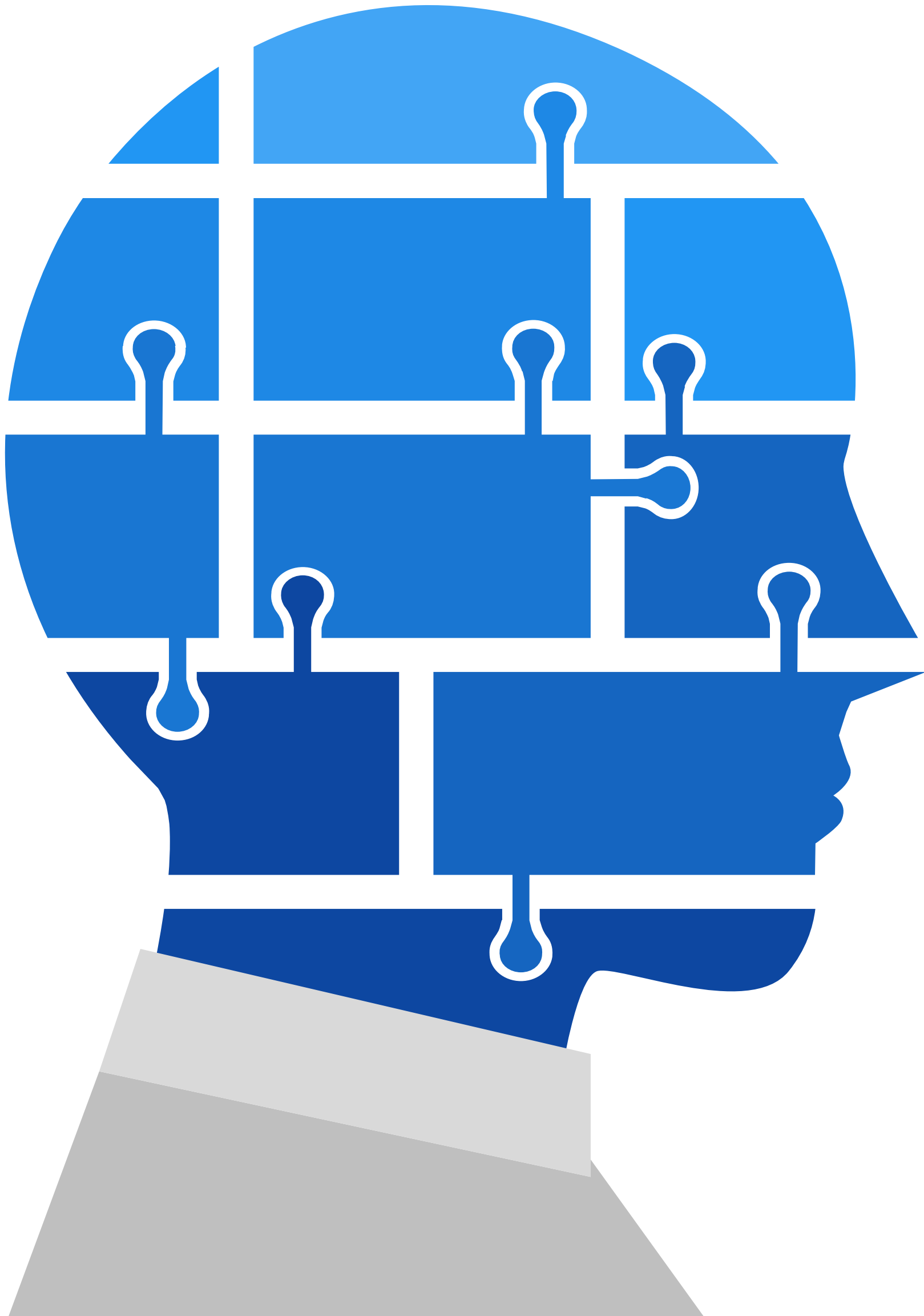
SHOWS VALUE

It shows your prospect that you care and are invested in the projects success.



UPSELL OPPORTUNITIES

It also gives you a chance to bring in more of a paycheck.



MAKE IT COUNT

That's it!!

terminology / nomenclature

USE THEIR LINGO

Table of Contents (working with a law firm)

1

Opening Statement
(The Intro)

2

The Discovery
(The Research Analysis)

3

Legal Briefing
(The Rundown)

4

Litigating a Successful Trial
(Scope of Work)

5

Deliberation & Retainer
(Timeline & Investment)

6

Defense Strategies
(Ideas)



Table of Contents (working with a boat manufacturer)

- | | |
|--|---|
| <p>1 Excited to Set Sail
(The Intro)</p> | <p>4 A Nautical Voyage
(Scope of Work)</p> |
| <p>2 Exploring the High Seas
(The Research Analysis)</p> | <p>5 Plotting the Course / Investment
(Timeline & Investment)</p> |
| <p>3 Captain's Log
(The Rundown)</p> | <p>6 Maritime Ideas
(Ideas)</p> |





Attachment Section

- 1 About Us
- 2 Case Studies
- 3 The Kicker
- 4 Info Page

This is where we house the “fluff stuff” but we also spice it up with “The Kicker”

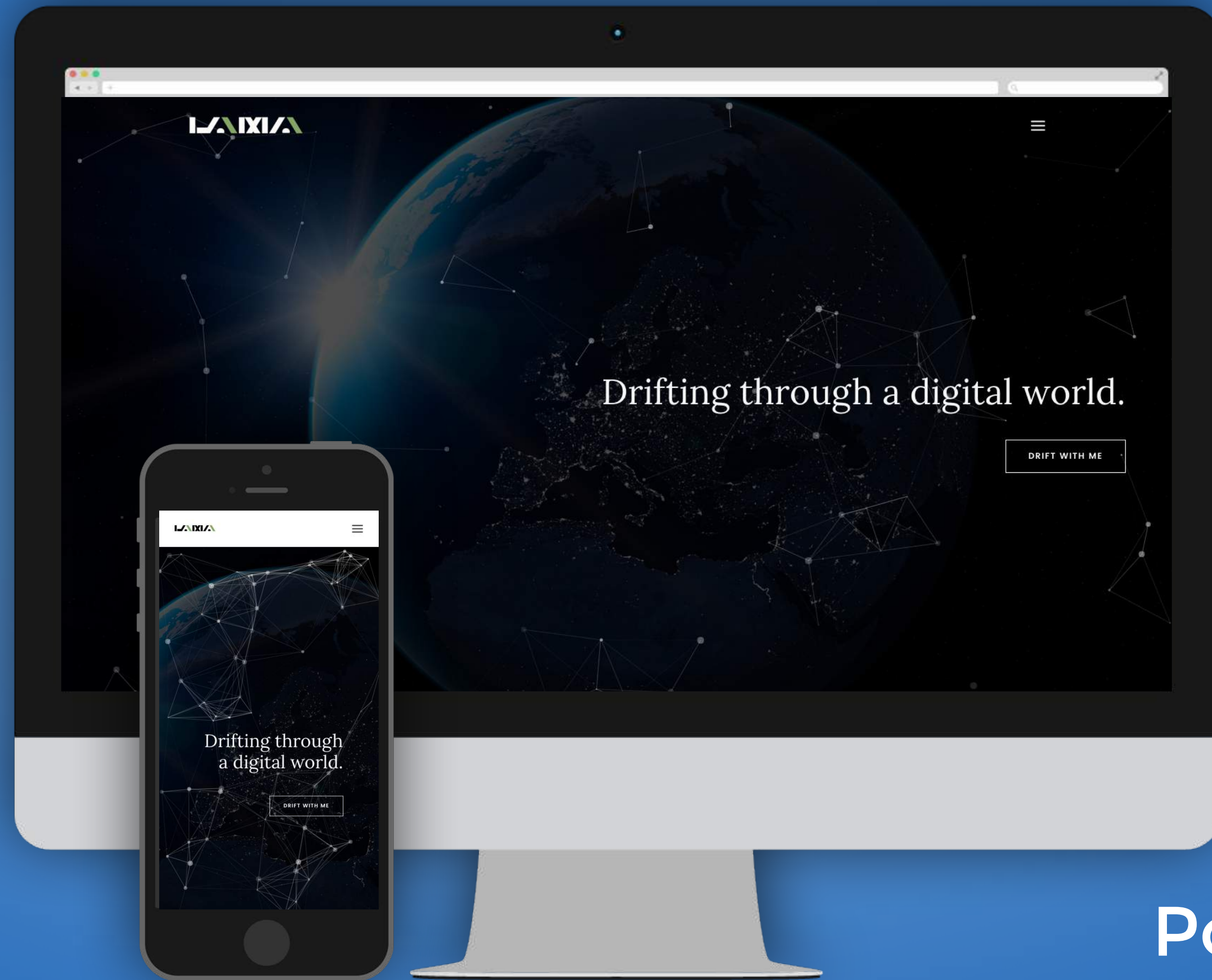


ABOUT US

Talk about how great you are.
Awards you've won.
Companies you work with.
Cool stuff you do.

I started in the technology space as a front end developer building websites from scratch using HTML/CSS. Moving over to WordPress was a huge leap in efficiency and ease of use. I work with different clients ranging from not-for-profit, to employment & education, and the construction field. My client list includes XYZ company, ABC organization, and QRS business.

I'm an active member in the WordPress community and I'm proud to have spoken at several WordCamps sharing my knowledge on topics like solutions consulting and custom proposal writing. I am an avid volunteer with the Young Leaders Circle helping to better the communities of Rhode Island and I sit on the Newport Interactive Marketers Advisory Board to help small business owners with matters relating to the web.



Case Studies

Portfolio Pieces

As many or as few as you want.
Make sure they relate back to what the prospect wants to do.
Short descriptions, they don't have to be true case studies,
maybe the appropriate term is "Portfolio pieces"

My new portfolio site that brings eye-catching imagery and animation to enhance the user's experience. Smooth calls-to-action make it easy to navigate. Modern hamburger menu with an overlay to choose different sections of the website. Parallax scrolling to add that "cool factor." Fully responsive. Leveraged JavaScript for a more robust user interface.

The Kicker (examples)

- 1 Content Strategy Best Practices
- 2 SEO Best Practices
- 3 Social Media Engagement
- 4 Analytics Guide
- 5 Sample User Personas

The Kicker should be something the prospect is concerned with, but may not be a part of the engagement...and may not be your area of expertise. Give them resources!

Content Strategy Basics

Good content is...

Need content ideas?
Generate some here:

<https://www.portent.com/tools/title-maker>

Need a content planner
Get one here:

<http://offers.hubspot.com/content-planning-template>



Appropriate

Publish content that is right for
the user and for the business.



Consistent

Mandate consistency, within
reason.



Useful

Define a clear, specific purpose
for each piece of content;
evaluate content against this
purpose.



Clear

Seek clarity in all things



User-Centered

Adopt the cognitive frameworks
of your users.



Concise

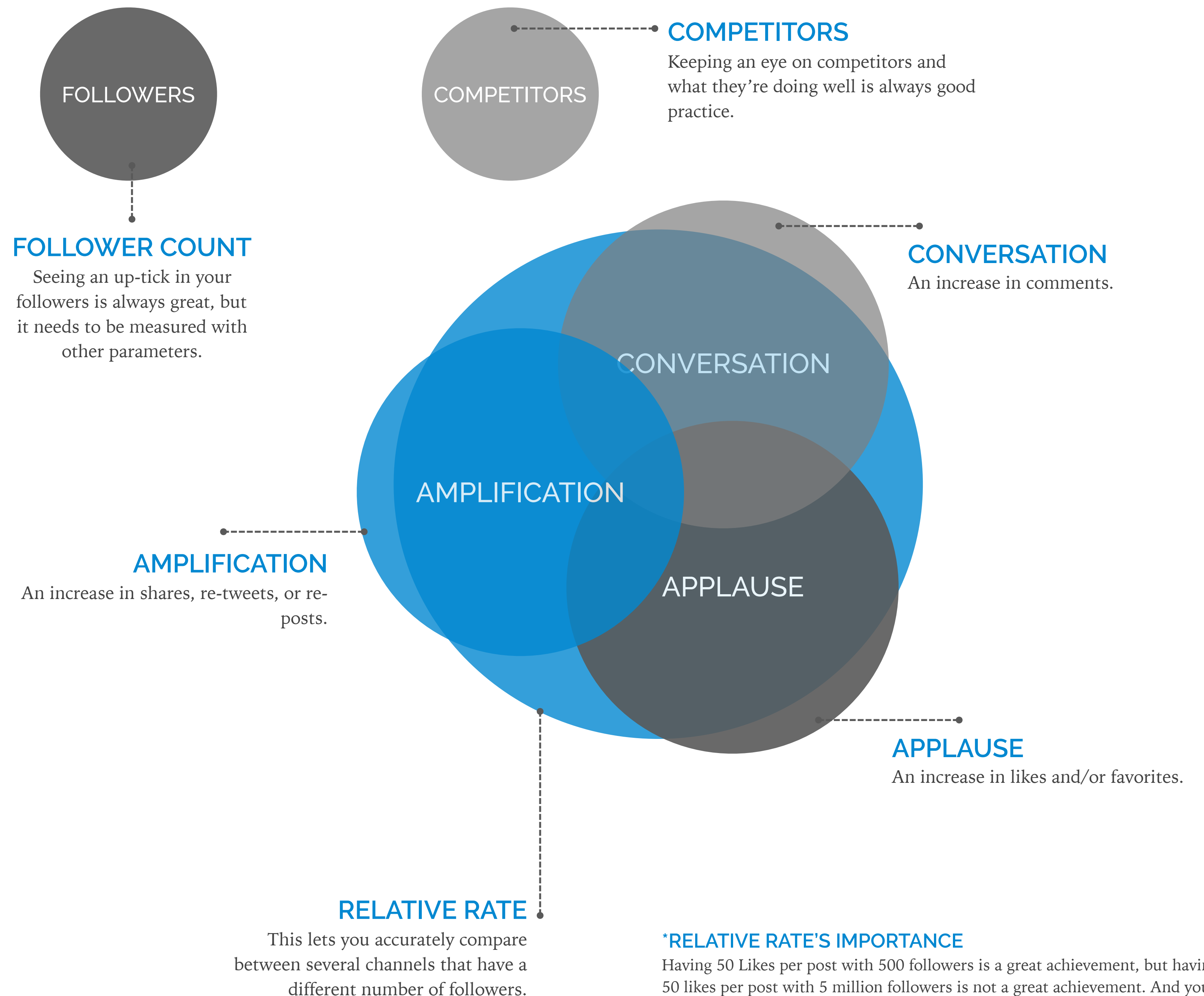
Omit needless content.

SOCIAL MEDIA ENGAGEMENT

There are a lot of great tools to manage and measure social media engagement. The one I like to use is called [TrueSocialMetrics.com](https://www.thesocialmetrics.com/). For \$30 dollars a month, you can gauge all ABC and XYZ social channels as well as some of your competitors. I would highly recommend this tool. You can go even further by integrating it with your Google Analytics to get better data.

Things we'd like to see:

1. An increase in engagement rates across these three areas:
 - Amplification
 - Applause
 - Conversation
2. A focus on relative rate to compare:
 - Followers to followers on different networks
 - Determine the engagement rate per follower, per channel
 - Work to improve those rates accordingly
3. An increase in our follower count.



Sample User Personas

The purpose of personas is to create reliable and realistic representations of your key audience segments for reference. These representations should be based on qualitative and some quantitative user research and web analytics. Remember, your personas are only as good as the research behind them. Effective personas:

- Represent a major user group for your website
- Express and focus on the major needs and expectations of the most important user groups
- Give a clear picture of the user's expectations and how they're likely to use the site
- Aid in uncovering universal features and functionality
- Describe real people with backgrounds, goals, and values

<http://offers.hubspot.com/free-template-creating-buyer-personas>

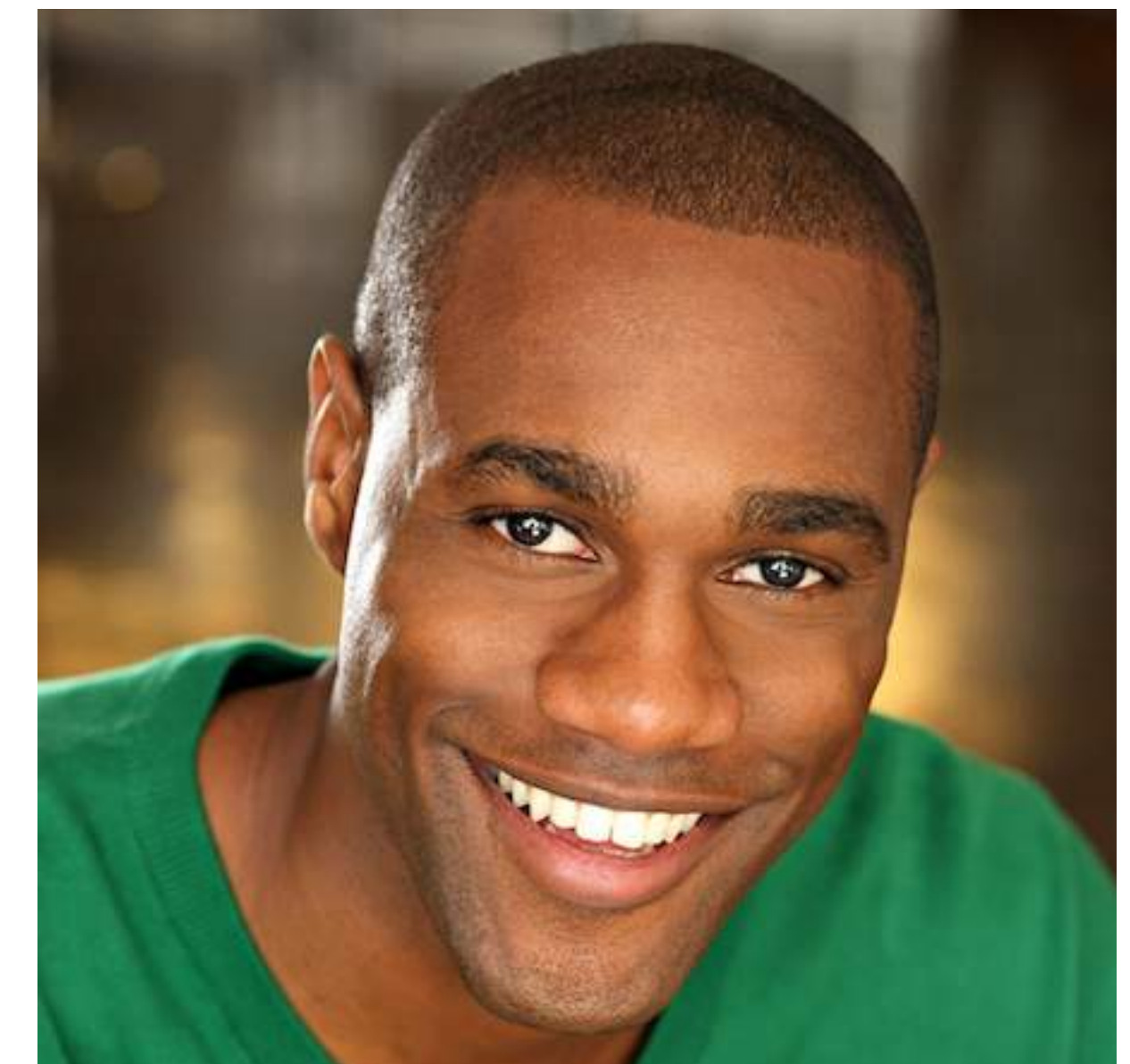


TESSA TENACITY

Tessa is super involved in her local community and plans on taking steps to become a Congresswoman after she completes her Master's. If she's not studying, she's looking online for great events to attend that support her causes. Her iPhone never leaves her side and she considers it an extension of her. When she discovers new professional groups, she signs up for their notifications and newsletters.

OUTGOING OMAR

Omar works at a prominent hospital as a PA. He's dedicated to health and wellness and loves getting people excited about being healthy. He is very outgoing and frequents a lot of health seminars, he never leaves home without his laptop. When Omar isn't helping people stay healthy, he volunteers with other young professionals to widen his personal and professional network. He's active on social media and keeps up to date on the latest technologies, When he finds an event he likes, he'll share it with his vast social networks.



Resources

BidSketch

1

<https://www.bidsketch.com/proposal-resources>

Proposify

2

<https://www.proposify.biz/proposal-templates/web-design-proposal-template>

Usability.GOV

3

<https://www.usability.gov/>

**True Social
Metrics**

4

<https://www.truesocialmetrics.com/>

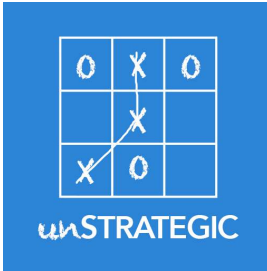
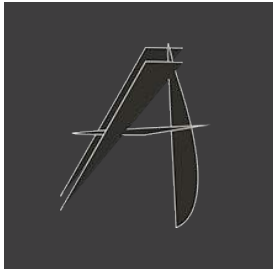
**HubSpot Free
Templates**

5

<http://blog.hubspot.com/marketing/free-content-creation-templates>

Remember!

- 1 Good user experience (based on authority and needs)
- 2 Custom proposals take time
- 3 It's about content and presentation
- 4 Get creative, experiment, have fun!



<https://unstrategic.com/writing-good-web-proposals/>

Taking the time to create good custom proposals may not always win, but you'll never be ashamed of what you put out there!

Thank you!



Adam Lamagna

Providence, RI

Website : unstrategic.com

Blog: unstrategic.com/blog

Email

beunstrategic@gmail.com

Find Us On Social

[linkedin.com/unstrategic](https://www.linkedin.com/company/unstrategic)

twitter.com/beunstrategic

