



2019 User Conference
INFORM. EDUCATE. INSPIRE



Improving Proposal Skimmability

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Fact: Almost nobody reads a proposal cover to cover.

Fact: If you want people to read your proposal, make it easy to skim.

Five Ways to Improve Skimmability

1. Use lots of headings and subheadings.
2. Provide summary answers.
3. Introduce each major section with a mini executive introduction.
4. Use callout boxes for mini case studies and quotes.
5. Use charts, graphs, and pictures that tell a story.

1. Use Lots of Headings and Subheadings

There are few things in the world as daunting, as intimidating, as a single, continuous page of text.

1. No one reads your proposal cover to cover
2. Write for skimmers, not readers
3. Make your proposals easy to skim
 - Use lots of headings and subheadings
 - Provide a summary answer prior to each answer
 - Introduce each major section with a mini executive introduction
 - Use callout boxes for mini cases studies and quotes
 - Use charts, graphs, and pictures that tell a story

2. Provide Summary Answers

Summarize your answer so the buyer can understand your message without having to read the whole thing.

Format:

- Graphic showing compliance
- Statement of compliance
- One or two sentence summary

Summary Answer Example

Question: Discuss how your office copier is compliant with our stated specifications.



Fully compliant. The office copier we are proposing is accessible from your network, and fully compliant with the specifications documented in your question.



Partially compliant. The office copier we are proposing is partially compliant with your requirements. It will work with your existing network, but it's not plug-n-play as you request, it must be manually configured.



Will be compliant. The office copier we are proposing is not currently compliant, but it will be by your targeted implementation date. The networking feature is completed and is currently in the final testing phase.



Not compliant. The office copier we are proposing does not support networking.

3. Introduce Major Sections With a Mini Executive Introduction

- Introduce the section, don't summarize it.
- Highlight the key points, the takeaways.
- Tell the reader what they will learn after reading this section.
- 3-4 paragraphs, *no more*.

4. Use Callout Boxes for Mini Case Studies and Quotes

- RFP: *Describe your customer service program.*
 - You: *“We’ve got great customer service.”*
 - Your reference customer: *“They have great customer service!”*
- Which one is more believable?

Callout Boxes

Mini Case Studies

- The problem the customer was experiencing.
- The solution you proposed.
- The benefit they got.

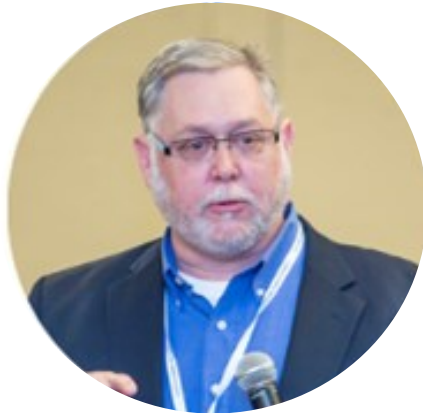
Customer Quotes

- At the beginning of major sections.
- In the body of answers to relevant questions.

5. Use Charts, Graphs, and Pictures If They Improve Skimmability

- Charts, graphs, infographics, and pictures can be excellent tools iff...
 - It's relevant to the topic
 - It's EASY to understand

Thank you!



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