

Sistemas de Informação e Modelação em Ambiente (SIMA)

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Workshop #1 - How to write proposals

The four key elements of a proposal

- Detailed solution – assume nothing
- Clear picture – explain benefits and value
- Provide proof – explain why you are the best team to do the job
- Connect – style, tone and layout

Credibility Killers

- What do you think will damage your credibility? The major credibility killers include:
- non-compliance
- poor spelling
- incorrect grammar and punctuation
- cluttered, unattractive, or illogical layout
- long-winded sentences and complex language
- too much information: a data dump
- the wrong tone
- lack of connection with the client.

Plain English

A plain English document conveys information clearly, concisely, and appropriately. Readers can easily understand the meaning after one reading.

- **Example 1**

A large portion of this funding is expected to be accessed by the school shortly to facilitate the development of a school hall.

- **Example 2**

The school will probably use most of this funding to build a hall.

Plain English

When you write, pay careful attention to your choice of language and to the sentences and paragraphs that you use.

- Build your paragraphs around a central idea
- Write short straightforward sentences
- Use appropriate words

Plain English

The MADE Standard

Documents and your writing should follow a MADE structure :

- **M**ain idea
- **A**ction statement (you or them)
- **D**etail
- **E**xtra

Ask yourself these questions before kick off

- What are the main objectives (objectives must be measurable)?
- Does it fit the topic described in the call/request for proposal?
- How is it unique?
- Whose problem does this solve?
- Why does it have to be your consortium working on this? Why can't others do it?
- Which consortium member will provide which skills?
- How will you know if you have succeeded - must be able to demonstrate research deliverables.
- Think about how the co-ordinator will monitor the work and how successful it is.
- How will measure your progress? Need to include clear milestones when doing the planning.

Types of Proposals



PITCH



CALL

“Initial line up in the Pitch”

PITCH

1. Vision and value proposition
2. The problem
3. Target market and opportunity
4. The solution
5. Revenue model or business model
6. Traction and validation/roadmap
7. Marketing and sales strategy
8. Team
9. Financials
10. Competition
11. Investment and use of funds

11 to 15 slides

30-40 min

Your initiative so...
don't push it.

“Who’s Calling?”

CALL

ToR
Terms of Reference

- Should define the “what”, the budget cap and the execution deadlines.
- Technical Requirements
- Functional Requirements
- Sometimes Tor aren’t as clear as it should...So, request for clarifications.

Study
Evaluation Criteria

- Time shall be spent in order to fulfill evaluation criteria.
- Sometimes, price is the only criteria...

Plan Proposal
rollout

- Plan should reflect criteria weights: methodology, Team experience, Deliverables.
- Budget exercise shall reflect its weight on total criteria.
- Define the proposal governance: coordinator, contributors.
- Define a plan with regular meetings to update status

Proposal Delivery

- “Looks” matter: invest on good design and clear communication, addressing all topics in such a clear way that makes life easy on the evaluation team.
- Communicate assuming the evaluators are dumb.
- Plan to delivery before Schedule: sh*# happens!