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Tips on Developing Winning Proposals

by Richard N. Pollack, FAIA, FIIDA

Now that we have returned to our offices after NeoCon®—and we have survived the crowded elevators and saw a number of new products—it is time to focus on increasing your pipeline of potential new projects. In fact, that's something you should always be doing. To paraphrase Philip Johnson: The first job you have as a new architect (or designer) is to get the first project. Your second job is to get the second project.

In my June column, I wrote about beginning the proposal process as soon as you receive a request for proposals (RFP) by:

- Identifying a proposal principal to champion the process.
- Making a go-or-no-go decision.
- Performing an initial detailed analysis of the RFP.
- Asking the client key clarification questions.

Now, let's examine the next steps. Best practices indicate that 15 percent of the time devoted to preparing the proposal should be spent on planning what you want to say and how you will say it. After that strategy is determined, the proposal tactics and preparations begin in earnest. Approach it just as you would start any project:

- Determine all parts and pieces of the proposal.
- Establish a schedule for all activities.
- Develop a detailed project plan and fee to describe the services you will provide.
- Identify and get project plans and fees from any subconsultants.
- Define who the content writers are and who will work on graphics.
- Complete miscellaneous items, such as site walk-throughs, and obtain insurance certificates.

Developing a highly effective proposal—through content and presentation—will make your submission stand out from your competitors. The most valuable information comes from your direct relationship with the client, followed by market intelligence, and finally by reading between the lines of the RFP. Market intelligence comes from relationships you have with real estate brokers, contractors, and furniture dealers. But remember not to take all of their information as gospel because it is, indeed, colored by those sharing it with you. I have had situations in which I was given seemingly intentional bad information because the person wanted another firm to win the work.

For the proposal itself, develop a standard format and page layout to make the process efficient. Provide that format to any subconsultants and mandate that they submit their material to you using that layout. The most powerful proposals make use of smart infographics to present complex information quickly and clearly, and also make it much easier for laypeople to understand the proposal.

Also, captions are important in your proposal (as they are in this magazine). A caption should succinctly explain to your potential client what is depicted in an image.

Your proposal needs to convey the benefits of hiring your firm, not simply show off the work or explain firm attributes. An attribute is: "We are a multi-disciplinary firm that utilizes an integrated design process." But a benefit is: "We apply an integrated design process that reduces cost, complexity, and potential risk for the client."

Concurrently with other proposal tasks, develop the project plan, or scope of services, and associated fee estimate. The fee must tightly align with the project plan, and should not include any additional services you know may be necessary but have not been requested in the RFP. Compare against how contractors bid projects—anything that you left off the drawings is a change order. Also, do not list any exclusions, but do include a detailed list of assumptions. Exclusions can become part of the agreement once you are selected.

The project plan should tightly track the RFP scope, including outline numbering, if present. I would ask the client for the Microsoft Word version of the RFP in addition to a PDF or hardcopy, then compare the client's scope to my firm's boilerplate and make adjustments in the document to support the RFP scope. Avoid obvious cut and paste, and make sure that the phrase "insert client name here" is not in the final proposal. I know of a highly qualified large firm that lost a major project because that phrase appeared a number of times in a proposal. Finally, have an uninvolved party within your firm review the proposal at least 24 hours before submitting.

Remember that the purpose of the proposal is to get to the interview. Next month, I will write about interview preparation and how to win the project with your team's great chemistry.

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