

WRITING REPORTS AND PROPOSALS



Career Development Series

Writing Reports and Proposals

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How to Use This Guide

This Self Study Guide is designed and laid out in a way that will guide student learning much in the same way that an instructor would. This workbook is comprised of modules called *Sessions*. Each Session focuses on a major concept in the course.

In each *Session*, we have included short-answer and (in some instances) multiple choice questions which relate directly to the Session material. Throughout the guide, you can take the opportunity to internalize what you have learned by completing the self-reflection exercises entitled “Making Connections.”

Session One: Course Overview

Course Overview

It is essential to understand how to write reports and proposals that get read. We write reports in a range of formats and a variety of purposes. Whether you need to report on a product analysis, inventory, feasibility studies, or something else, report writing is a skill you will use again and again.

Having a method to prepare these documents will help you be as efficient as possible with the task. This course will build on a solid base of writing skills to present information in formal, informal, and proposal styles.

You should complete Velsoft's *Business Writing That Works* course before taking this workshop.

Learning Objectives

At the end of this workshop, you will be able to:

- Prepare reports and proposals that inform, persuade, and provide information.
- Review your work so that it is clear, concise, complete, and correct.
- Apply these skills in real work applications.

Why did you take this course? Use this opportunity to consider your personal learning objectives and reasons for taking this course.

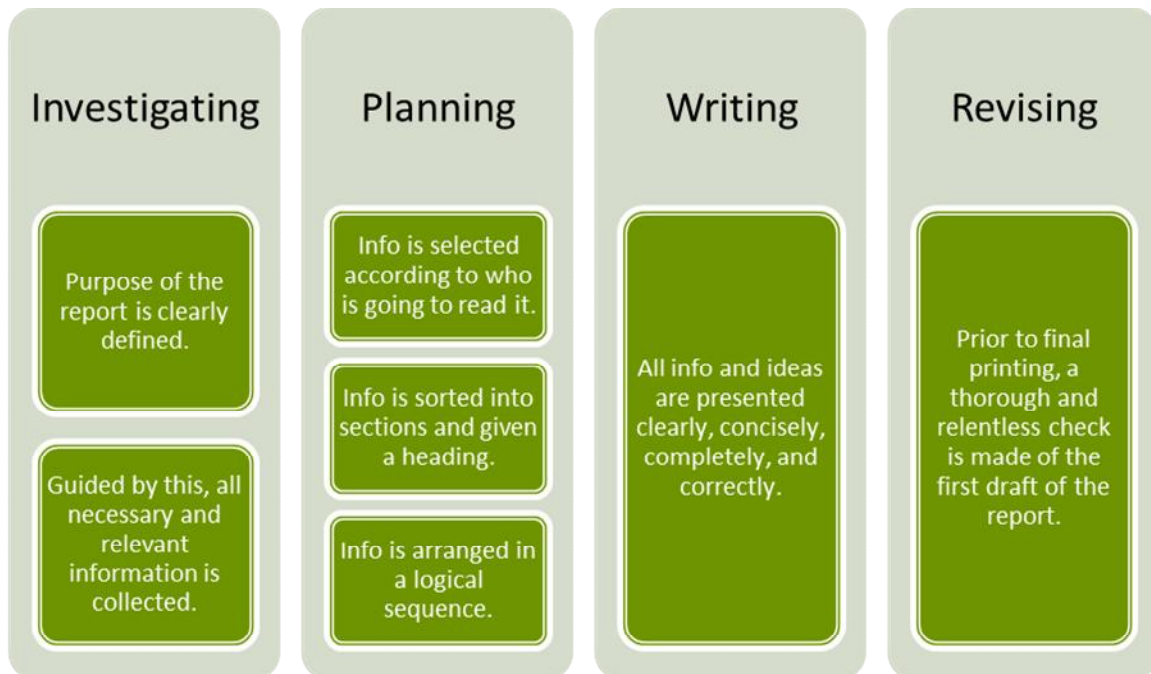
Session Two: The Stages of Report Writing

Breaking down a large task into smaller pieces can make it seem much more manageable. If you are in the process of thinking about writing your next report, you may find it easier if you consider the process as a series of small steps.

In this session, we will introduce you to the four stages of report writing: investigating, planning, writing, and revising. We will also review the four C's that must be part of each stage.

The Four Stages

There are four stages involved in the production of a report:



In each of the stages, every effort should be made to ensure that the report follows the rules of good writing and is clear, concise, complete, and correct.

Writing a report will probably remind you a little of work that you did in school. Remember that there is a lot of work to do before you actually start to write. You finish things up by editing, editing, and editing again.

Session Three: The First Stage – Investigating

The first step in any report or proposal is to gather the information that will make up the document. Expert opinions and hard numbers often form the core of many reports and proposals, and your documents will likely be no exception.

In this session, we will talk about how to gather accurate information for a report, and how to choose what to include and exclude. You will then apply your knowledge to a quick exercise.

Gathering Information

Your first step is to gather the information for your report. Following these guidelines will ensure that what you gather is accurate.

- Collect your evidence before you write by observing, interviewing, doing research, and gathering data.
- Organize your evidence.
- Keep your evidence clear of your opinions. Make sure that your own bias isn't skewing the evidence by letting how you feel about it get in the way of what you gather.

In most studies, you will gather masses of information and you must **be selective** about what goes into your report. Your selection should be based on:

- The purpose of your report. What is it meant to achieve?
- The people to whom it is directed (the reader or readers). You have to decide what the readers already know and what they need to know.

Unless you are an unquestioned authority on your subject matter, **your opinions** will only carry as much weight as the evidence that you can gather. The more evidence you can collect before writing, the easier your writing will be.

Evidence consists of the facts and information you gather in three ways:

- Careful observation
- Interview
- Research (in your company library or archives, surveys, statistical review, etc.)

In order to make sure that your report is not biased, don't focus only on evidence that will support your argument. You need to objectively present the positive and negative results in order for people to see the integrity in your data and the report.

To give formal reports credibility and authority, researchers generally rely on a certain amount of secondary data, obtained in print or electronically. What suggestions do you have for conducting effective research? Where do you look for information?

Let's Get Thinking!

What sources might you use for each of these report topics?

Results of 360 degree performance reviews

How much succession planning New England farmers have done

Efficiency of different types of project management software

Alternative energy sources that your company could use

Safety issues in your workplace

Trends in the shipping industry

Session Four: The Second Stage – Planning

Once you have your information gathered, you need to choose the correct format to present it in. You will also need to create an outline.

In this session, we will review some of the most common report formats, including the memo report, letter reports, and formal and informal reports. You will then apply your knowledge to your pre-assignment report.

Choosing a Report Format

It's time now to plan your way through the rest of the report, so try to delay the temptation to start writing for just a little while longer.

First, **review the purpose of the report**. This could be to share an idea, answer a question, solve a problem, or share information. Make sure that you can describe the purpose of the report in straightforward terms. This will help you to keep your information clear when you start to write.

Consider the different **types of formats** available to you and decide which is best for the information that you have and for your audience. The different report types are presented here from least to most formal.

Memorandum Report

This format looks like a regular memorandum (memo) at the top. It is helpful as a short report about internal matters, and is not sent to anyone outside the company. A memorandum report can be helpful for reporting on internal sales figures, letting a manager know how the team has done during the week, or to provide an interim update on an inventory.

Since this is an internal document, it can be objective and impersonal. Simple headings and text that is flush left in bold or italics are often used for quick referencing. The report may be initialed at the beginning, where the sender's name is noted, or signed at the bottom (four lines after the text ends and typed above a signature line), or left unsigned. Your standard company memo format is used on the first page, and subsequent pages are printed on plain paper.

Letter Report

The letter format is practical for informal reports that run several pages. Since it is in a letter format, it can also be used for people or groups outside of the organization. These reports are typically used by outside consultants to provide updates on project analyses or

recommendations. They may also be used by a board of directors to describe changes and developments to stakeholders. The first page of a letter report is typed on letterhead stationery, with plain paper used for subsequent pages. Opening with a subject line replaces a title, and simple headings (as in the memo report) add emphasis and clarity.

Short Report

Short reports are distinct from memo and letter reports in both scope and format. They may include several of the same elements of a formal report, such as:

- A title page
- Preliminary summary (including conclusions and recommendations)
- Authorization details
- Statement of the problem
- Observations
- Conclusions
- Recommendations

Tables and graphics may be added if they are pertinent. **Headings** (as described in the formal report below) may also be used.

Formal Report

Formal reports are a sophisticated presentation. They are more complex and longer than the other formats due to the content. A formal report may include all of the following elements, which are often described in company policy in order to keep reports consistent throughout an organization.

Cover

Includes the title and author's name, and may be on a label attached to the cover if the cover is not a printable material. (Colored or clear plastic are often used.)

Flyleaf

A blank page following the cover. There can also be one at the end of the report, where people can write comments if they want.

Title Page

Title of the report, who the report was prepared for (name and title of recipient), author's name, position, department and/or address, and date.

Letter of Authorization

If the writer received written authorization to undertake the report, the letter or memo may be inserted here. If authorization was verbal, then a note describing who provided authorization can be part of the letter of transmittal or the introduction (described on the next page).

Letter of Transmittal

Explains how, why, and under what circumstances the report was prepared. This may also be a preface to the report. This document outlines the purpose of the report, its scope, any limitations to the report, and the research methods used. This letter often ends with a thank you for the assignment and openness to answer any questions about the report. This letter is printed on letterhead and signed by the author.

Foreword or Preface

Often completed by someone other than the writer (such as a department head or other stakeholder).

Synopsis or Executive Summary

An informative summary covering the purpose of the report as well as key findings, conclusions, and recommendations.

Table of Contents

Contains main divisions with page numbers.

List of Figures or Illustrations

Needed only if there are many illustrations and graphs.

Introduction

Includes whatever the reader needs in order to understand the report, such as background, scope and limitations; details about your approach or method; and criteria used in making your evaluation.

Body

The meat of the report.

Summary

Tells your reader what you set out to do and what your findings are.

Conclusions

Summarizes the facts in the report and spells out the conclusions.

Recommendations

Offers recommendations based on the conclusions.

Appendix

May include statistics, tables, and other information of interest. This is information that would only be useful to some readers and would therefore not be appropriate in the body of the report.

Glossary

Helpful if your readers are not familiar with vocabulary used in the report.

Index

Not required, but helpful in extensive reports.

References

Very extensive reports may also contain footnotes or endnotes and a bibliography.

Notes

Some of the elements listed above may be left out, depending on the nature of the report and the audience. For example, a letter of transmittal may be waived depending on the information in the foreword.

Reports that are long are normally bound on the left margin, so wide left-hand margins and right flush page numbers are appropriate. The opening pages (excluding the title page) are normally paginated with lowercase Roman numerals (i, ii, iii, iv, etc.), while the rest of the report is paginated with Arabic numerals (1, 2, 3, 4, 5, etc.).

Individual Activity

Review the report that you brought in as your pre-assignment.

Can you see how other formats would work for your report?

What are appropriate formats for the type of work that you are doing?

Session Five: The Third Stage – Writing

When you start writing your report, you are really getting at the heart of your message. While writing can be daunting for some, we find it helps to break the task into smaller tasks, and then you simply need to settle in and write.

In this session, we'll review nine rules for writing. Then, you will practice each rule by rewriting some problem sentences and paragraphs.

The Nine Rules

These rules will help to keep your writing clear, concise, complete, and correct:

1. Use familiar words
2. Prefer short, simple words
3. Use concrete words
4. Prefer active to passive verbs
5. Avoid camouflaged verbs
6. Arrange sentences for emphasis and clarity
7. Keep sentences short
8. Ensure modifying words and phrases relate to nouns and pronouns
9. Use words economically

Use Familiar Words

Rewrite each of these phrases to use more familiar words.

The preponderance of businessmen we consulted envision signs of improvement from the current siege of economic stagnation.

If liquidation becomes mandatory, we shall dispose of these assets first.

Mr. Casey terminated John's employment as a consequence of his ineffectual performance.

Prefer Short, Simple Words

Rewrite each of these phrases to use shorter, simpler words.

The most operative assembly line configuration is a unidirectional flow.

Business has an inordinate influence on governmental operations.

It is imperative that the consumer be unrestrained in determining his preferences.

Our expectations are that there will be increments in commodity value.

Use Concrete Words

Rewrite each of these phrases to use concrete words rather than generalizations.

We have found that young men are best for this work.

He makes good grades.

John lost a fortune in the stock market.

If we don't receive the goods soon, we will cancel.

Profits last year were exorbitant.

Prefer Active to Passive Verbs

Rewrite each of these phrases in the active voice.

Our action is based on the assumption that the competition will be taken by surprise.

It is believed by the typical union member that their welfare is not considered to be important by management.

We are serviced by the Bratton Company.

Our safety is the responsibility of management.

You were directed by your supervisor to complete this assignment by noon.

It is recommended that the machines be purchased by our company.

Because of our policy, the proper thing is being done by us for excellent jobs performed by any and all of our employees.

Issuance of a supplement to the report was undertaken.

The above-mentioned report that we are approving is enclosed.

Your thoughtful suggestions are graciously accepted. Hopefully, forthcoming recommendations are being given the same sort of careful consideration by you.

Avoid Camouflaged Verbs

Rewrite each of these phrases to be more direct.

It was my duty to make a determination of the damages.

We will make her give an accounting of her activities.

We will ask him to bring about a change in his work routine.

This new equipment will result in a saving in maintenance.

Arrange Sentences for Emphasis and Clarity

Rewrite this paragraph to be clearer.

The main building was inspected on October 1. Mr. George Wills inspected the building. Mr. Wills is vice president of the company. He found that the building has 6,500 square feet of floor space. He also found that it has 2,400 square feet of storage space. The new store must have a minimum of 6,000 square feet of floor space. It must have 2,000 square feet of storage space. Thus, the main building exceeds the space requirements for the new store. Therefore, Mr. Wills concluded that the main building is adequate for the company's needs.

Keep Sentences Short

Rewrite each of these phrases to use shorter sentences.

The Consumer Education Committee is assigned the duties of keeping informed of the qualities of all consumer goods and services, especially of their strengths and shortcomings, of gathering all pertinent information on dealers' sales practices, with emphasis on practices involving honest and reasonable fairness, and of publicizing any of the information collected which may be helpful in educating the consumer.

Ensure Modifying Words and Phrases Relate to Nouns and Pronouns

Rewrite each of these phrases so that the modifiers relate to the correct noun(s) or pronoun(s).

Miss DuClerq is the only secretary to Mr. Grossmeyer.

Report any other defects or mechanical damage to the supervisor in the finished product.

Loose blouses which some women wear around punch presses are hazardous.

Arriving early for my interview the Personnel Office was not open.

Swearing thunderously the office almost shook with the boss's anger.

Driving cautiously the dangerous intersection was approached.

Jackson has opposed often giving praise to the workers.

Smith stated late in the week the production was behind schedule.

Use Words Economically

Rewrite each of these phrases to use fewer words.

In view of the fact that we financed the experiment, we were entitled to some profit.

We will deliver the goods in the near future.

Mr. Watts outlined his development plans on the occasion of his acceptance of the presidency.

I will talk to him with regards to the new policy.

The candidates which had the most money won.

There are many obligations which we must meet.

We purchased coats which are lined with wolf fur.

Mary is of the conviction that service has improved.

Sales can be determined to have improved over last year.

It is essential that we take the actions that are necessary to correct the problem.

Session Six: The Fourth Stage – Revising

You've probably seen all sorts of writing that was not edited and noticed how bad it can look. We have seen store signs, flyers, and news tickers on TV with errors. Sometimes we can overlook them, and sometimes they are more serious and make us gasp.

In this session, we'll introduce a checklist to help you review your work. As well, you'll get some experience with the practical side of spelling.

Checklist for Success

A good report can lose credibility if it is shabbily written or poorly organized. We recommend that you submit to relentless revision in order to polish your report. The best way to start this is to set the report aside for a day so that when you return to it, you do so with fresh eyes and energy. Give yourself a breather.

In the revision stage, your objective is to ensure that your report measures up to the four C's of business writing. This means that your report should be clear, complete, concise, and correct.

Your report is **clear** if it is fully understood at first reading. By **concise**, we mean that all information is down to an intelligent and intelligible minimum. Your report is **complete** when every piece of essential information has been included. Finally, your report is **correct** when all information is both accurate and verifiable.

Checklist for Revising

Review your first draft with the following points in mind.

Check the Facts

It's embarrassing (and possibly fatal to your reputation) to build a whole case on incorrect facts or figures. Be careful not to treat an assumption as a fact, nor to treat assumptions from other people as facts.

Check the Length

Should you cut or add? A report is too long if it tells the readers more than they want to know. It is too short if it misses important evidence or fails to draw obvious conclusions. Make sure you've given your readers the details and examples they need to see your point and accept it. Remember that we are inundated with too much to read, so don't make the frequent mistake of assuming that readers are interested in a blow-by-blow account; you can smother the important points in too much detail. Not every bit of information uncovered in your research needs to be included.

Check the Organizational Structure

Your report ought to have a beginning, middle, and an end, and each part should do its job effectively. The beginning should make it clear what the communication is about. The middle should develop and support the main idea with specifics: details, figures, examples, quotations. The ending should summarize, reinforce the point, and perhaps make recommendations.

Check each paragraph for unity and coherence. Unity means that only one idea is developed in each paragraph. Coherence means that each sentence in the paragraph logically hooks onto the preceding sentence and leads into the following one. Look at your paragraphs: can you identify a topic sentence in each (a sentence that states the main idea which the rest of the paragraph develops)? If not, the paragraph may be a candidate for deletion or rewriting.

Your goal is to make clear that each paragraph relates to the main idea (your thesis), that each grows out of the preceding paragraph, and that each leads into the following one. A paragraph should begin with something that links it to the one before it. The linking word may be a key word repeated, a pronoun whose antecedent is in the previous paragraph, or a transitional word bridging a gap in thought.

Check the Style

In general, be on the lookout for lengthy, obscure sentences; wordiness; pretentiousness; overuse of the passive voice; and imprecise language. Read your work aloud, noting the parts where you stumble or misread and the parts that sound dull and boring, even to you. Pump more energy into those parts by substituting action verbs and concrete nouns.

Then, use this three step process to tighten up the style:

- Cut. Eliminate words or phrases that don't pull their weight.
- Rearrange. Put the ideas you want to emphasize at the beginning or the end of sentences, the places of natural emphasis.
- Rewrite. If cutting and rearranging don't work, take more drastic action: scrap the sentence and try it again. Imagine your reader confronting you with, "What are you trying to tell me here?" and then write your answer to that question as directly as you can.

Apply these remedies to every swollen section or infected sentence. All you need is a red pen. Cross out words and phrases that don't say anything. Draw arrows to rearrange words or sentences. Cut out sections that contain irrelevant information. If you need to get it off your computer screen to really see it, print it off. Then you can literally use scissors to cut out the whole paragraphs and use tape to put them in a different order. Rewrite only when editing or rearranging are not effective.

Check the Spelling, Grammar, and Punctuation

Look up the spelling of words you habitually misspell and check if you are doubtful. Be alert to possible problems in agreement or the placement of modifiers; be sure every pronoun has a clear reference. See that your punctuation is both correct and appropriate.

Remember that you can spoil an otherwise good piece of writing by a blatant, distracting error. Since it is very difficult to see your own errors, don't be afraid to have someone else read the piece over, looking specifically for errors in spelling, punctuation, and grammar.

Spelling Test

Identify the correct spelling for each group of words.

Group One

- a) acomodate
- b) accomodate
- c) accomodate
- d) accommodate

Group Two

- a) arguement
- b) argument
- c) arguement
- d) arguemint

Group Three

- a) comitment
- b) comittment
- c) commitment
- d) comitmant

Group Four

- a) consensus
- b) concensus
- c) consencus
- d) concencus

Group Five

- a) deductible
- b) deductable
- c) deductuble
- d) deductabel

Group Six

- a) embarras
- b) embaras
- c) embarass
- d) embarrass

Group Seven

- a) existance
- b) existence
- c) existanse
- d) existense

Group Eight

- a) foreward
- b) forword
- c) forworde
- d) foreword

Group Nine

- a) harass
- b) haras
- c) harrass
- d) herrass

Group Ten

- a) occassion
- b) ocassion
- c) occasion
- d) ocasion

Session Seven: Using Headings

Close your eyes for a moment and imagine a crisp white sheet of paper that is covered from edge to edge in text. People are inundated with things to read, so they will tend to read documents that are attractive and have a balance between text and white space.

In this session, you will learn about using headings and subheadings to break up your text, and to give your readers a break too.

Using Headings

Headings and subheadings are an important part of any report. They follow uniform styles throughout, and often use a decimal style to subdivide topics, although some writers prefer not to have numbers and letters in the headings and sub-headings. What's important is to determine the style that you will use, and then apply the format consistently throughout. Examples are included below.

1. Main heading
 - 1.1 Subheading
 - 1.2 Subheading
 - 1.21 Sub-subheading
 - 1.22 Sub-subheading
 2. Main heading
 - 2.1 Subheading
 - 2.2 Subheading
 3. Main heading
-
- I. Main heading
 - A. Subheading
 - B. Subheading
 1. Sub-subheading
 2. Sub-subheading
 - II. Main heading
 - A. Subheading
 - B. Subheading
 - III. Main heading

In addition to what you're already keeping in mind, you should also know that headings and subheadings must be **grammatically parallel**.

| Not Parallel | Parallel |
|--|--|
| 1. Selecting a topic 2. The outline 3. How to gather information a. Primary research b. Doing secondary research | 1. Selecting a topic 2. Writing the outline 3. Gathering information a. Primary research b. Secondary research |

The most important headings are formatted to be the most prominent in the report. For example, the highest level heading might be in a bold font with large bold letters, and an automatic space below the heading. Medium level headings will be slightly smaller and without the space below. Lower level headings may have only the first letter capitalized.

If you are working in a program similar to Microsoft Word, you will find pre-formatted styles which are available as headers at several levels. You can experiment with these to select the styles that you prefer.

The headers can be left black, like the main text of your document, or you can use one color for headers throughout (perhaps the company color). Just make sure that your use of color is not distracting from the report itself. Remember that you can always stick to black for unity and consistency.

Session Eight: Using Charts and Graphs

Graphs and charts are helpful tools, provided they add something to the report or explain something that words do not. Don't use illustrations, graphs, or charts unless they are necessary.

In this session, you'll explore some different types of figures (another term for these illustrations) and how they can support your presentation or proposal.

Types of Charts

Since the report's purpose is to communicate information in the most precise and meaningful way, tables and graphs may be important supplements to the narrative. To be effective, they must be well-designed and clearly executed. They should also be carefully integrated with the text of the report.

There are five basic kinds of statistical graphs, each with advantages and disadvantages. The trick is to match the proper graph to the kind of data you wish to present.

| | |
|-------------------------------|---|
| Area Graph (Pie Chart) | Simplest breakdown of percentages. |
| Bar Graph | Versatile; easy comparison of amounts, subdivisions, relations. |
| Column Graph | Useful for comparison of related items having two different measurement units (such as profits, years). |
| Line Chart | Most flexible for graphing and comparing trends. |
| Surface Chart | Useful for special emphasis on a particular feature within a trend. |

How and When to Use Graphics

Graphics like charts, tables, and lists command attention; unless, of course, you have overused them. Correctly used, they give the report a different way of seeing information.

Use graphics in your report:

- If your data is complex and using a table or chart will help the reader understand your point.
- If compiling the data in a table or chart will save the reader time.
- If a list, chart, or table will conveniently collect information the reader may want to refer to later.

Put illustrations near the appropriate text. If you talk about a table or chart, make sure the reader can find it by placing it near the discussion of the point it is to illustrate. To be sure that your graphics help the reader, let each chart illustrate only one point. Also, since the reader shouldn't be expected to interpret the data for himself, make sure you point out what the table shows—call attention to trends, relationships, totals, increases, and so on.

Things to Remember About Graphics

If the text is crystal clear without the chart, question your decision to use it. Maybe it's not really necessary. Sometimes as a writer we put so much effort into our work that we hate to cut anything out, so you may have to step back to really answer the question honestly. If the text is incomprehensible without the chart, perhaps you are expecting the chart or table to do your work for you. The visual cannot make your point; it can only help you illustrate it.

Be sure to lead the reader into and out of your list, chart, or table by introducing it and concluding it in the text itself. In most cases, if there is an illustration, there should be an explanation. Both should be clear enough to serve the writer's purpose in meeting what he considers to be the needs of his reader.

Here are some other tips:

- Put long, complicated graphics in the appendix. Use bite-size tables and charts in the text.
- Keep tables and charts as brief as possible.
- Signal the reader when a table or chart is coming up.
- Label graphics clearly and specifically.
- Number tables and charts consecutively throughout the report. Do not, however, mix the two.
- Use a graphic only if it will help the reader understand your point.
- Don't interrupt the text with a graphic; lead the reader into it and out of it.
- Point out the significance of the table or chart to the reader.
- Keep the graphic as simple as possible.
- Use white space and labeling to make your graphics attractive; make the reader want to look at them.
- Consider using tables and charts in the appendix as a way to compile and present all your significant data in convenient form.
- Usually both the title and caption are centered above the chart, but any consistently followed method will do.

Session Nine: The Proposal

Proposals are persuasive documents that are formatted similar to reports in that they use many of the same elements. They are not always strictly a sales tool; they can also be a helpful way to present a business case.

In this session, you'll learn how proposals differ from reports, and how to write them following our helpful tips and techniques.

The Differences When Writing Proposals

A proposal is primarily a sophisticated document that seeks to define problems or opportunities and to sell client or management support on your ability to provide solutions and strategies.

Proposals can be created because you see an idea and want to persuade someone to go along with it (by purchasing your product or services, or by agreeing with your persuasive arguments in a business case). Proposals are commonly used as a stage in the sales process, before a buyer makes a purchasing decision.

Proposals can also be the result of a large company or a government department issuing a “call for proposals” or “call for tenders.”

Tips for Proposal Writing

Like a report, a proposal is broken up with **headings and subheadings** to make the reading easier. Proposals can range from informal (in an e-mail) to formal, so again it is important to know your audience.

Proposals written in response to a **company or government request** are formatted similar to a formal report. In the call for proposals, there will often be a list of mandatory and optional elements to include.

Mandatory requirements mean that you **MUST** respond to those elements or else your proposal will be excluded from being considered. Some of the mandatory requirements can be extremely time consuming, and so we mention them here so that you are prepared to gather the information you need.

For example, one of our in-house trainers writes proposals for government. Depending on the government department, in addition to proposing the services that she could provide, she has had to include the following documentation with proposals:

- Proof of liability insurance
- Proof of company registration (incorporation and tax registration documents)
- Copies of health and safety policy
- Copies of privacy policy (so that they know what you will do to protect sensitive information)
- Reference letters and contact information so that they can verify your reliability
- List of qualifications of every team member that will work on the contract (which they may also wish to verify)
- Police background checks and/or fingerprinting for contracts that deal with sensitive government information

Because of very specific and detailed requirements in some proposals, you will need to start your investigations well before the deadline for your proposal. Letters of reference and proof of insurance cannot always be instantly produced. It is a good idea to keep a **master file** of information often needed for proposals, and to keep everything in it up to date.

Sales proposals for a business to **business (B2B) sale** or a **business to customer sale** can be short and straightforward. They often take no more than two to three pages to outline how your company can help your customer solve a problem by getting something that they need.

A sales proposal often **includes** a cover letter, an outline of why your company is a great choice, the details of what you propose (how it will benefit them in some significant way), the cost, and perhaps a deadline for when that price will expire.

The Ten Steps of Proposal Writing

The ten steps of proposal writing are:



Let's break these ten steps down.

Clarify Your Objectives

What is this report going to do?

- Tell or inform?
- Sell or persuade?
- Play a consulting role?
- Convince someone to do something?

Analyze Your Audience

- Who is your primary reader? Who is your secondary reader?
- What is the reader's knowledge?
- How will the reader benefit from your message?

Get Your Thoughts on Paper

Here are some intuitive methods:

- Mind map
- Brainstorming
- Free writing
- Sticky notes
- Index cards

Here are some analytical methods:

- Focusing (topics and subtopics)
- Five W's (who, what, when, where, why)

Group and Label Your Thoughts

Now, the outline begins. The easiest way is to sort your information by topics and subtopics.

Sequence Your Thoughts

Here are some ways to put your thoughts in order.

- Most to least important
- Least to most important
- Process
- Contrast/comparison
- General to specific
- Specific to general

Make an Outline

Now that you have your thoughts in order, draft them into an outline. Remember, this is just a road map, and it can be adjusted.

Write Your Draft Down

Using your outline as your road map, write out your draft. Then, let an outsider review it.

Edit

- Delete
- Keep terminology consistent
- Keep a consistent format
- Avoid buzzwords and jargon
- Write in the reader's language
- Don't rely on grammar and spell checks
- Have a low fog index

Add the Finishing Touches

- Use a readable font
- Include headers and footers
- Make use of graphics
- Include headings that speak to the reader

Proofread and Edit

This is the last step, although you need to run through it several times before you are really finished!

Session Ten: Persuasion

Designing a captivating message that persuades your reader to take action is a mark of very effective writing. Part of the preparation you need to do includes designing your message carefully and preparing for some difficult questions.

In this session, you will learn the steps in the persuasion process, and what to add to your writing in order to convince your readers of a certain course of action.

The Acid Test

Ask yourself these questions:

- Does the reader know me?
- Does the reader like me?
- Does the reader want to do business with me?

If you have answered “No” to any of the above questions you will have to do some persuading to do in your report.

Steps in the Persuasion Process

There are many ways to persuade others, although you will probably be most successful using a combination of several methods. Consider all approaches before you actually set the wheels in motion to go about persuading someone. Social psychologist William McGuire lists six such steps: presenting, attending, comprehending, yielding, retaining the new position, and acting.

Presenting

You can't persuade anyone of anything unless he or she is in the right place, at the right time, to receive the message. If the person doesn't read the proposal or hear your presentation, your message is not going to penetrate and be persuasive at all.

Attending

The person may be in the right place at the right time to read your proposal or see your presentation, but not pay any attention to it. They might be thinking of something else. The person must attend or pay attention to the message if you are to have any hope of persuading them.

Comprehending

If the person can't understand your message, there isn't much chance that he/she will be persuaded. The point is that you have to use a message that your audience can comprehend. If you don't, your message may be technically perfect, but it will fail to communicate, and thus fail to be understood.

Yielding

If the person got the message, and understood it, but remains unmoved from his or her previous position, communication has occurred but persuasion has not.

Retaining the New Position

If your message has successfully persuaded someone to change their position, but has not been successful enough to make that person retain their new attitude over a period of time, for all practical purposes this attempt at persuasion has failed. It is not enough to get the message through. That message has to be retained long enough for the desired action to occur.

Acting

Assume that your message was remembered and that you actually were persuasive enough for someone to retain a particular attitude. However, it was not successful or persuasive enough to get any action. You have been partially successful, but you may not have achieved what you set out to do.

Summary

To be successful, persuasion must accomplish all six of these steps:

1. You must get your message to the audience.
2. You must get someone to pay attention to it.
3. The message must be understandable. People are more likely to read things they can understand. They won't come over to your side if they don't understand what your side is.
4. Your arguments must be convincing.
5. The audience must be willing to give in or to yield.
6. They must remember their new attitude and be willing to act.

Designing Your Message

Design your message to take advantage of any helpful qualities your organization, your department, or you have.

Credibility is an important quality. Usually, the more credible a source, the more persuasive it is. The best way to be credible is to tell the truth, even when it hurts. Honesty and accuracy build credibility. What you write must also correspond to your organization's actions. Management can't represent one thing while you write something else.

Credibility has two major elements: **expertise** and **objectivity**. People are more likely to believe you if they think you know what you are talking about, but they must also believe you are telling the truth.

Being liked helps make persuasion more successful. So does being similar to audience members in some way. If you can find **common ground** between you and your audience, you are more likely to persuade them to your position.

Perceived power is another characteristic that leads to effective persuasion. If you have any power over your audience, then you are more apt to be successful in persuading them to see your point of view.

Finally, audiences tend to believe people who **know more than they do**—but not too much more!

Dealing with Tough Questions

When you are writing a message, there are several fundamental but difficult questions you will likely have to answer.

Should you only give one side of the story in your message?

Generally speaking, no. If you can identify objections or the other person's side of the story first, you have gone a long way toward potentially defusing any objections that may exist.

Which side should you give first?

If you feel the other side has some strong arguments in their favor, get them out of the way first by bringing them up one by one and building your case against them. If you think the group will be largely in favor of your proposal, then you might get away with just mentioning them after you've swung the group to your way of thinking.

Should you make conclusions specific or let the audience draw its own conclusions?

It depends on the audience, their knowledge of the subject under discussion, and the manner in which you make conclusions. No group will want to be talked down to or patronized. On the other hand, if this is a group that is in unknown territory, you can help them draw their own conclusions.

Do fear techniques work?

Usually they may work short term but not long term, and then they will not only fear you but resent you.

Is it better to use an emotional or a factual argument?

Your best bet is to feel passionate about the facts.

Session Eleven: Practical Application

Nothing like practice can get us ready to apply new skills in a meaningful and realistic way. The more writing that you do, even if you do not enjoy the process, the easier it gets.

In this session, you'll review your own work and apply a checklist for review. This is an excellent way to ensure that no steps are missed.

| Task | Item | ✓ |
|-----------------------------|---|---|
| Check the facts. | Are the facts correct? | |
| | Are there any assumptions? | |
| Check the length. | Does it tell readers more than they want to know? | |
| | Does it miss important evidence? | |
| Check the structure. | Does it have a beginning that makes it clear what the report is about? | |
| | Does the middle develop and support the main idea? | |
| | Does the ending summarize, reinforce the point, and make recommendations? | |
| | Is each paragraph unified and coherent? | |
| | Does each paragraph relate to the main thesis? | |
| | Does each paragraph relate to the paragraph before and after it? | |
| Check the style. | Be on the lookout for lengthy, obscure sentences; wordiness; pretentiousness; overuse of the passive voice; and imprecise language. | |
| | Read the report out loud and circle parts where you stumble or you find yourself bored. | |
| | Cut, rearrange, and rewrite. | |
| Check for errors. | Check spelling and grammar. | |
| | Check punctuation. | |

| Task | Item | ✓ |
|--------------------------------|--|---|
| Check the requirements. | All mandatory requirements are included. | |

Session Twelve: Giving Credit

If you take a moment and think about the amount of work you've done to write a report, a letter, or even your resume, you realize the amount of work that goes into anything worthwhile. When you get close to the end of a significant report, it can be tempting to cut corners, but this is one step not to skip.

In this session, you'll learn the essential steps of citing your sources properly and giving credit where it's due.

Citing Sources

If you use data from secondary sources, the data must be documented; that is, you must indicate where the data originated. Using the ideas of someone else without giving credit is **plagiarism** and is unethical.

Even if you paraphrase and put the information in your own words, the ideas must be documented. In citing sources, you should **use direct quotations sparingly**. Good writers use the exact words of another writer to emphasize opinions because of the author's status as an expert; duplicate the exact wording before criticizing; or repeat identical phrasing because of its precision, clarity, or aptness.

Citing sources strengthens your argument as a writer, and shields you from charges of plagiarism.

Documentation Styles

These are **four popular styles of documentation**.

- **MLA** (Modern Language Association) is used in literature and most of the humanities.
- The **APA** (American Psychological Association), which is generally used in the social sciences
- The **CBE** (Council of Biology Editors) is used in biology and many other sciences.
- The **Chicago** Manual of Style which actually has two styles it favors.

Most styles ask that references be listed on a page by themselves, alphabetically by author, and includes all the references you used to produce your report. This list is called References, Works Cited, Cited References, or References, depending on the style you have used. (The Chicago Manual of Style uses the titles Bibliography, Selected Bibliography, and Works Cited.)

The list for any given paper or report may include a variety of sources. A source is anything you draw information from, and in your report you should list every source you use.

Citing Sources

Every bibliography entry is created from a number of standard components. The most basic three are author, title, and publication information. As with all our writing, it is important to be consistent within your document, and demonstrate your attention to those details.

As you can see from the examples here, the differences between formats are pretty significant to look at, although the details are the same within each record.

One author, in Chicago Manual style:

Lynne Truss. *Eats, Shoots & Leaves: The Zero Tolerance Approach to Punctuation*, New York, Gotham Books, 1993

One author, in American Psychological Association (APA) style:

Truss, Lynne (1993). *Eats, shoots & leaves: The zero tolerance approach to punctuation*. New York, Gotham Books, 1993

One author, in British Broadcasting Corporation News Style Guidelines:

Eats, Shoots & Leaves: The Zero Tolerance Approach to Punctuation, Lynne Truss, Gotham Books, New York, 1993

Entry Components

Here is a list of each element you might find in a bibliography entry for a book or part of a book.

- The author's or authors' names (or the editor or editors' names if you are referring to a collection). This part of the entry comes first, since a bibliography is in most cases an alphabetical listing by author of material used in writing a book or report.
- The title of the work.
- The name of the collection you found the work in.
- The editor's or editors' names (if the work appears in a collection), or translator or compiler, if one is used.
- The edition number for works other than a first edition.
- The number(s) of the volume(s) used.
- Publication data: the place of publication, followed by the publisher's name, and in MLA, the date of the publication.
- The page numbers of the work, if the work is part of a collection.

Bibliography Exercise

Bibliography Entry One

Bibliography Entry Two

Bibliography Entry Three

Recommended Reading List

If you are looking for further information on this topic, we have included a recommended reading list below.

Bates, Jefferson D. *Writing with Precision*. Penguin, 2000.

Birkets, Sven, and Donald Hall. *Writing Well (Longman Classics Edition)*. Longman Classics, 2006.

Bly, Robert. *Selling Your Services*. Owl Book, 1992.

Guffey, Mary Ellen. *Essentials of Business Communication*. South-Western College Pub, 2006.

Kessler, Lauren. *When Words Collide: A Media Writer's Guide to Grammar and Style*.
Wadsworth Publishing Company, 2003.

King, Stephen. *On Writing*. Pocket, 2002.

Strunk, William, and E.B. White. *The Elements of Style, Fourth Edition*. Longman, 1999.

Truss, Lynne. *Eats, Shoots & Leaves*. Gotham Books, 2006.

Zinnser, William. *On Writing Well*. Collins, 2006.

| As a result of what I have learned in this course, I am going to... | My target date is... | I will know I have succeeded when... | I will follow up with myself on... |
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