

NEW YORK STATE ASSOCIATION OF
PROFESSIONAL LAND SURVEYORS

presents

A WEBINAR BY
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THE SCIENCE
OF
PROPOSAL WRITING



Proposal Writing: An Art and a Science

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Proposal writing is a
science
and an
art.

Your Biggest Proposal Issue

What Clients Want

Responsiveness

Predictability

Budget Accuracy

Consumer Bill of Rights

All consumers of services offered by licensed professionals have the legal right to:

- **Receive competent professional services.**
- **Verify the credentials of licensed professionals and to know the names and titles of licensed professionals who provide service.**

- **Receive clear explanations of the services being offered or provided and how much they cost.**
- **Refuse any services offered.**
- **Know what client records will be maintained and how to obtain copies; personally identifiable information normally cannot be revealed without the consumer's consent.**

New York State Land Surveying Practice Guidelines

Section 4

Type & Purpose of Survey

*Each surveyor should **confer with the client** to determine the purpose of any surveying service. The specific purpose of a survey may determine the category of services needed, the information required and the work to be done.*

Receive clear explanations of the services being offered or provided and how much they cost.

Confer :

Have discussions

Discussion :

*The action or process of **TALKING** about something in order to reach a decision or exchange ideas.*

Technological Isolation

Digital Casket

Pre – Proposal Meeting

Who

What

Where

When

Why

Don't work in a vacuum.

Your Clients need to
see and hear you !!!

Relationships
are the fuel that
drives professional services

“Real chemistry happens in person”

“ We’re genuinely interested in understanding our clients. We get to know you and what you are looking for.”

Cindy Harington
– It’s Just Lunch

What is a Proposal?

Webster's says:

A plan, offer, etc., presented for acceptance or rejection.

Black's Law Dictionary says:

An offer, by one person to another, of terms and conditions with reference to some work or undertaking, or for the transfer of property, the acceptance whereof will make a contract between them.

Our Definition:

A detailed written document used to search for, obtain, manage, and complete professional service projects.

Skills required for proposal writing:

Subject matter expert

Marketing and sales

Match clients expectations and evaluation criteria

Turn facts into a reason to choose your proposal

Creativity

Do not use boiler plate in description of project or scope unless answering a specific technical requirement.

Writing

Message needs to be easily read and understood by the evaluator.

Words should communicate rather than impress.

“Details of the scope of services to be provided are outlined herein.”

Task 2:

Global Positioning System (GPS) Control Points

Our GPS survey field crew will provide the horizontal control datum in NAD-1983. The vertical control datum will not be needed for this project. All the survey information will be based in the New Jersey State Plane Coordinate System (GIS format).

When writing proposals, public speaking,
or any preparing any communication

KNOW YOUR AUDIENCE !!

Proposals are **NOT** one size fits all

Malpractice Concerns

- Practicing beyond the scope of the profession.
- Performing unnecessary or unauthorized services.
- Charging for work not done.

BASIC CONTRACT REQUIREMENTS

LEGAL

1. Contracting Parties.
2. Scope of Services.
3. The Fee Requested (offer)
With the Method of Payment

BASIC CONTRACT REQUIREMENTS

4. Conditions of Performance
5. Time Requirement
6. Signatures
(Acceptance)

Do you include how you will perform a task
in your proposal?

ANSWER: NO

Why?

ANSWER: **BECAUSE NOBODY CARES !!!**

Any Exceptions?

ANSWER: YES – Technical RFP.

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TECHNICAL - SCOPE OF SERVICES

Definition:

Scope of Services is identifying and describing the work that is needed to complete the project in sufficient detail to ensure that:

- The project team understands what is to be done.
- All of the reasonably knowable project work has been identified.
- Appropriate management controls can be applied.

SCOPE

1. Procedural Path for the project
2. In Great Detail
3. Meet all Rules of Professional Conduct and Standards of Practice
4. Clearly Expressed in Layman's Terms and
Conversational Language

Know your audience

S C O P E

Sufficiently

Control

Other

Peoples

Expectations

RED FLAG WORDS

All

Approve

Assure

Attest

Certify

Complete

Ensure

Every

Full

Guarantee

Inspect

Insure

Oversee

Sufficient

Supervise

Warrant

Maximize

Minimize

SCOPE CREEP

Definition:

The change or growth of project scope.

Goal:

Manage scope creep to minimize the impact of the changes on the project.

Request For Proposal Or Qualifications

RFP OR RFQ

To obtain a consistent body of information to
compare offers

RFP answers should be:

On Topic

Clear

Factual

Complete

Persuasive

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The general procedure for RFP responses should be:

Acknowledge –

Restate the project in general terms.

Persuade –

Incorporate a benefit statement as soon as possible.

Substantiate –

Factual answers. Focus on features that matter to that particular client.

Seminars and in-house staff instruction available through

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**.....to the point
or place
of beginning.**

Containing 2,230 invaluable bits of wisdom.

T H A N K Y O U ! ! ! ! !