PRO TIPS FOR POWERFUL PROPOSALS
Nicole Aleong & Lauren McCrae
June 7, 2018
WHAT WE WILL COVER TODAY

1. Preparing to write a proposal
2. Generating hypotheses
3. Visual design
4. Demonstrating commitment to the project
5. Show, don’t tell
6. General principles for good proposal writing
PREPARING TO WRITE A PROPOSAL
BEFORE YOU SIT DOWN TO WRITE, MAKE SURE YOU KNOW THE ANSWERS TO THE FOLLOWING...

<table>
<thead>
<tr>
<th>Business context</th>
<th>Outcomes</th>
<th>Methodology</th>
<th>Logistics</th>
</tr>
</thead>
<tbody>
<tr>
<td>• What is the business problem that led to this RFP?</td>
<td>• What does success look like?</td>
<td>• Any methodologies you think you would prefer and/or not be open to?</td>
<td>• Budget</td>
</tr>
<tr>
<td>• Ask for more context about research objectives, even if they are listed in the RFP</td>
<td>• How will you use this research?</td>
<td>• Would you like to see tiered options?</td>
<td>• Key business deadlines to be aware of when creating the research timeline</td>
</tr>
<tr>
<td>• Who are the key stakeholders involved in the research and who will use the findings?</td>
<td>• What challenges do you think we’ll need to overcome to achieve success?</td>
<td></td>
<td>• How many bidders? Who?</td>
</tr>
<tr>
<td>• Any past research that we should be aware of?</td>
<td>• What kinds of deliverables do you envisage, and who are the audiences for these?</td>
<td></td>
<td>• Is there an incumbent, and if so, why are they going out to other vendors?</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Criteria for deciding the winner</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Who are the key stakeholders deciding the winning proponent?</td>
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</table>
GENERATING HYPOTHESES
DEVELOPING HYPOTHESES

Hypothesis = a proposed explanation for a phenomenon
DEVELOPING HYPOTHESES

Attitudes to smart homes likely depend on:

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<th>Those who own the tech will know more about it than those who do not</th>
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VISUAL DESIGN
VISUAL DESIGN PRINCIPLES

CONTRAST

ALIGNMENT

REPETITION

PROXIMITY
AFTER

01
Define the behavior
What is the behavior we are trying to understand?

02
Develop hypotheses
What could be encouraging or inhibiting the behavior?

03
Decide how to collect the data
Projectives, direct questions, observations…?

04
Determine order
What do I need to explore first to reduce bias?
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**Customer Journey**

**Key Support Points**

**Attraction**
- Free banking
- Free Money

**Account setup**
- No monthly fees & no minimum balance
- Free unlimited banking
- Special features & discounts
- Canadian & American
- Operating for 90 years
- Government insured
- Open an account in under 5 minutes

**Relationship building & brand differentiation**
- Different kind of bank
- No shareholders
- FI with heart
- Cares about finances
- Member Owned (Credit Union)
- Customer service ratings
- Donation of profits to local charities
- Customer referral program
- Rewards for good financial behaviour (savings plan, incremental cash-back credit card, cash-back debit transactions)
- Financial planning tools
BIG 5

1. Free banking
2. Free Money
3. Secure FI
4. Secondary Account

DIGITAL

5. No shareholders
6. FI with heart
7. Cares about your FWB

KEY SUPPORT POINTS

1. No monthly fees & no min. balance
2. Free unlimited banking
3. Canadian & American
4. Operating for 90 years
5. Government insured
6. Open an account in under 5 minutes
7. Member Owned (Credit Union)
8. Customer service ratings
9. Donation of profits to local charities
10. Customer referral program
11. Rewards for good financial behaviour
12. Financial planning tools
Revised slide building up

Frankie Aeng, 4/3/2018
DEMONSTRATING COMMITMENT TO THE PROJECT
FIRST LOOK

Secondary research

IDIs with your network

Google Surveys

Vox pop intercepts
FIRST LOOK – EXAMPLE

We are so enthusiastic about working with you that we have already conducted some preliminary research through our personal networks.

- We conducted three, 15 minute interviews over the phone with nurses from our personal networks, to provide you with some initial insights into your website experience.
- We found that overall, your website is very easy to use. Registration is easy because it is step-by-step.
- One nurse commented that she would like to be able to use an application in the portal to help her calculate her practice hours, as this is the only step in the process she has to do outside the portal using a calculator or Excel.
- …
CREATING MODELS / FRAMEWORKS

Linear, sequential process/flow

Cycle

Pyramid

Venn diagram

2x2

Stages
DEVELOPING HYPOTHESES

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CREATING MODELS / FRAMEWORKS – EXAMPLE

Owners

Low purchase consideration

Beginner smart home consumers

Non-smart home consumers

High purchase consideration

Advanced smart home consumers

Interested smart home consumers

Non-owners

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SHOWCASE YOUR PASSION IN OTHER CREATIVE WAYS

- Team bios
- Experience
- Deliverables
SHOW, DON’T TELL
SHOWCASE YOUR PASSION IN OTHER CREATIVE WAYS – EXAMPLE

Kiba & Yuki
- Shiba Inus
- 5 and 7 years

- Most days, Kiba goes to work with Hanson and Yuki goes to work with Hanson's wife Cynthia.
- Kiba has grown up at Lux as he started working here as a pup. As a result he has great depth of research expertise and chairs the Advisory Board.

Nala
- Mixed (rescue). Collie, Shepherd, Golden Retriever cross.
- 4 years

- Nala is exceptionally great at catching frisbees.
- She has a spot called “pride rock”, that whenever she hears the words, she goes to the top landing of the stairs and stares out the window as a “guard dog”.

Poppy
- Vizsla - Hungarian Pointer
- 4 years

- Poppy keeps the Lux team energized and on-point.
- Poppy’s areas of expertise include, sprinting, a good game of keep-away, squirrel chasing, and stealing the covers at night.

Macy & Hudson
- Sheltie & Aussie Shepherd/Cavalier King Charles Spaniel cross
- 7 months and 3 years

- Macy is the rarest coloring for a Shetland sheepdog. Hudson refers to it as “odd”.
- Hudson earned the nickname Meerkat as a puppy because of the uncanny resemblance when he was in his awkward gangly stage (which Macy says he’s still in 3 years later).
Don places a lot of heart into his business. Started in his loft in East Vancouver as a side job, he quickly gained attention and has grown the business with two more employees in the past year. Cash flow is his top concern, and anything he can do to increase his bottom line is a top consideration. Don works an average of 50 hours a week and is frequently on the go. Quickly growing, Don is looking for efficient ways to invest in his business that will allow him the flexibility that his new company needs.

Don is a fairly serious individual, and in his free time devotes his energy towards skiing, hiking, and occasionally going out for dinner with his University pals. He frequents local establishments such as Ask for Luigi and Hawksworth.

“I am worried about my business cashflow. Being a small company with international clients means I need flexibility.”
GENERAL PRINCIPLES FOR GOOD PROPOSAL WRITING
KEEP IN MIND AT ALL TIMES...

01. A proposal is an **argument**.

02. Focus on the **outcomes**.

03. **Tailor** your proposal to the decision maker.

04. **Examples** are key.

05. Don’t we, we, wee all over yourself – focus on the **you**, the client’s issues and make it about them.

06. Remember to **CYA**.

07. Be **creative** and have **fun** – your **passion** will shine through!
WHO HAS A QUESTION?
THANK YOU!

Get in touch!

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Lauren McCrae, lauren@luxinsights.com
APPENDIX
SECTIONS OF A GOOD PROPOSAL
**GENERALLY NEED TO INCLUDE…**

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<td>Cover letter: Why choose Lux</td>
</tr>
<tr>
<td><strong>02</strong></td>
<td>Background &amp; objectives</td>
</tr>
<tr>
<td><strong>03</strong></td>
<td>Team, experience &amp; testimonials</td>
</tr>
<tr>
<td><strong>04</strong></td>
<td>Approach</td>
</tr>
<tr>
<td><strong>05</strong></td>
<td>Deliverables</td>
</tr>
<tr>
<td><strong>06</strong></td>
<td>Timelines &amp; cost</td>
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