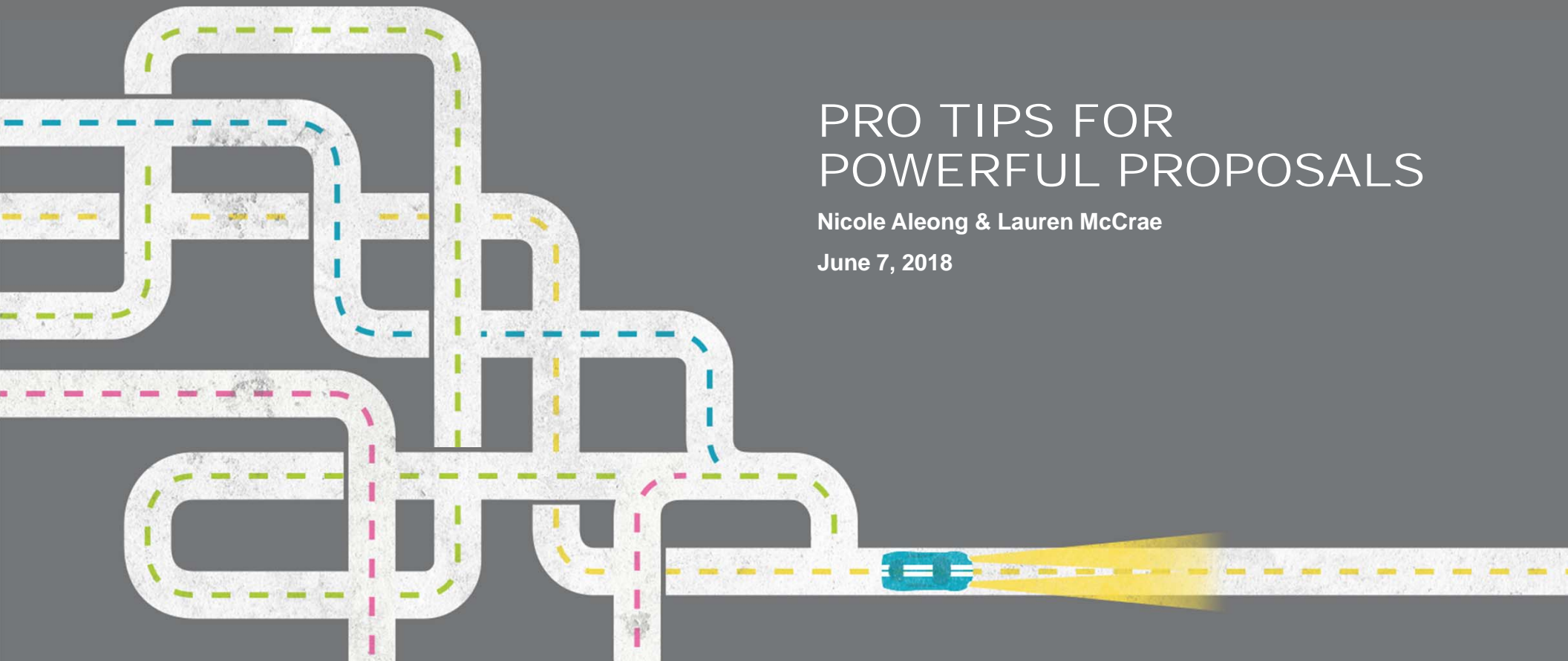




PRO TIPS FOR POWERFUL PROPOSALS

Nicole Aleong & Lauren McCrae

June 7, 2018



WHO WE ARE



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...

Business context

- What is the business problem that led to this RFP?
- Ask for more context about research objectives, even if they are listed in the RFP
- Who are the key stakeholders involved in the research and who will use the findings?
- Any past research that we should be aware of?

Outcomes

- What does success look like?
- How will you use this research?
- What challenges do you think we'll need to overcome to achieve success?
- What kinds of deliverables do you envisage, and who are the audiences for these?

Methodology

- Any methodologies you think you would prefer and/or not be open to?
- Would you like to see tiered options?

Logistics

- Budget
- Key business deadlines to be aware of when creating the research timeline
- How many bidders? Who?
- Is there an incumbent, and if so, why are they going out to other vendors?
- Criteria for deciding the winner
- Who are the key stakeholders deciding the winning proponent?

GENERATING HYPOTHESES



DEVELOPING HYPOTHESES

Hypothesis = a **proposed explanation** for a phenomenon

DEVELOPING HYPOTHESES

Attitudes to smart homes likely depend on:

**Ownership of
smart home devices**

Those who own the tech will know more about it than those who do not

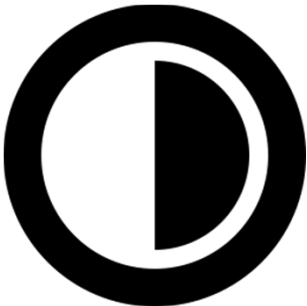
**Likelihood to consider
(re-) purchasing smart
home devices**

Those who are likely to consider are more likely to see value in the tech than those who are not

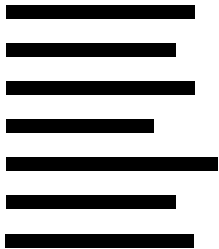
VISUAL DESIGN



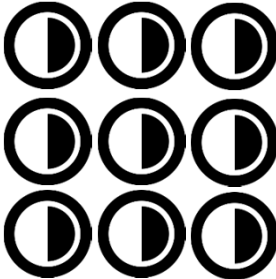
VISUAL DESIGN PRINCIPLES



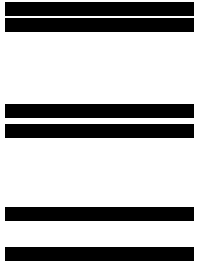
CONTRAST



ALIGNMENT

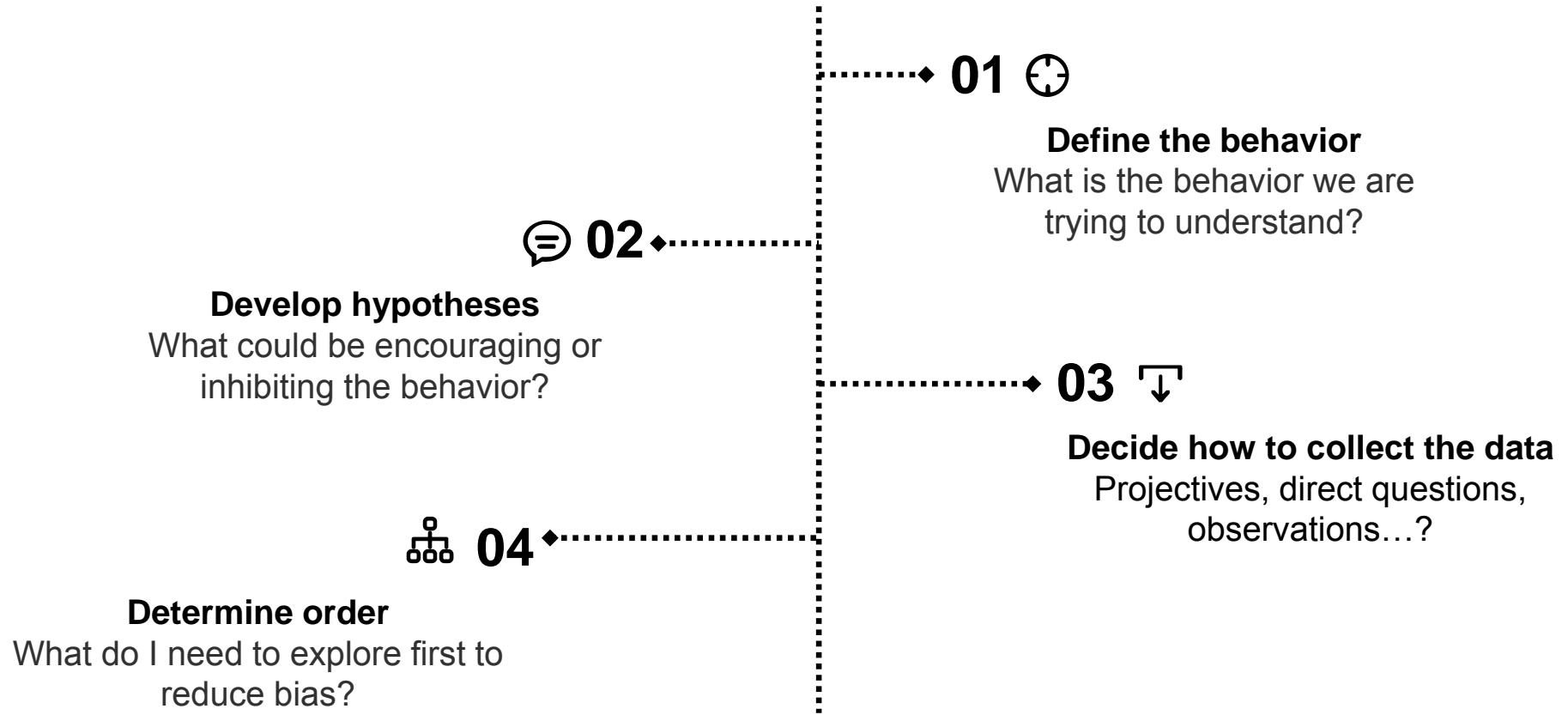


REPETITION



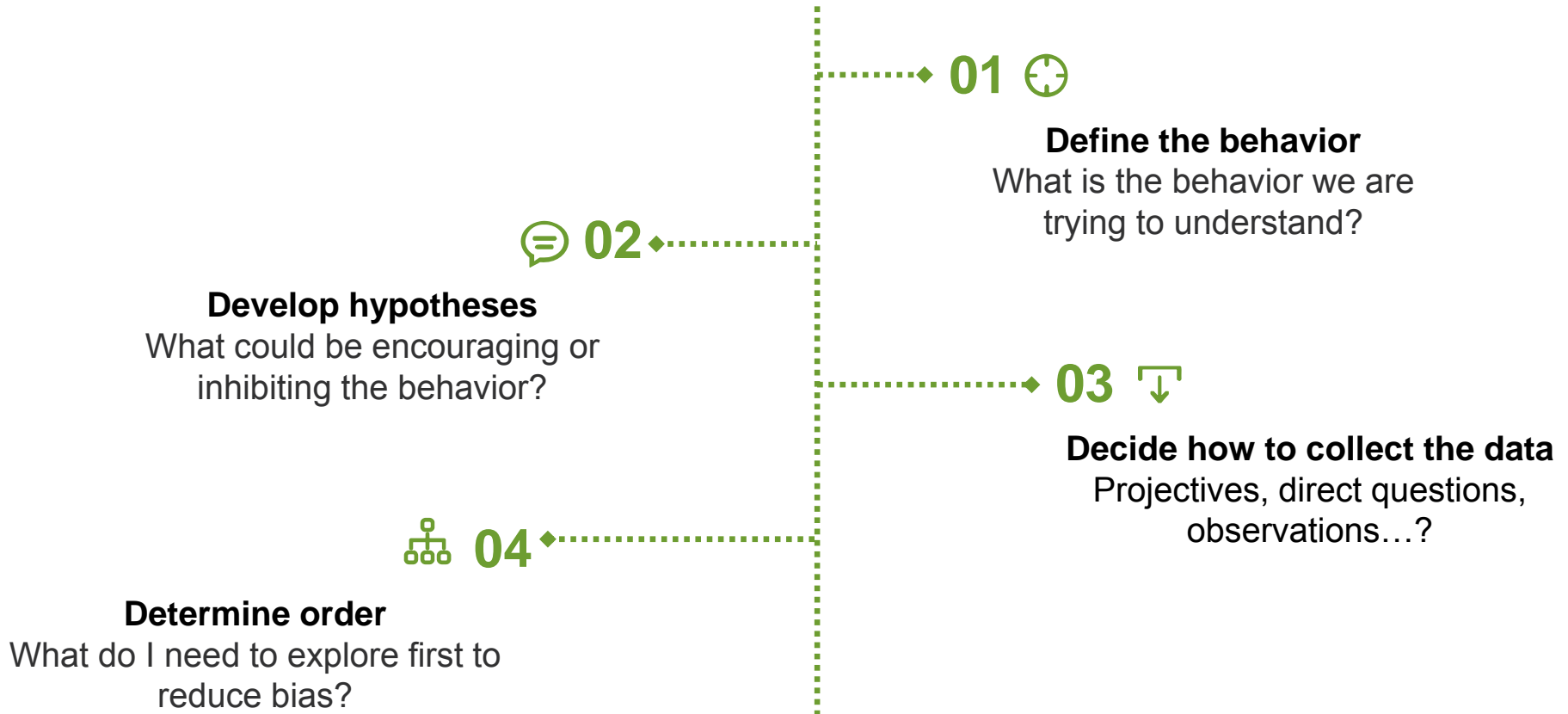
PROXIMITY

AFTER

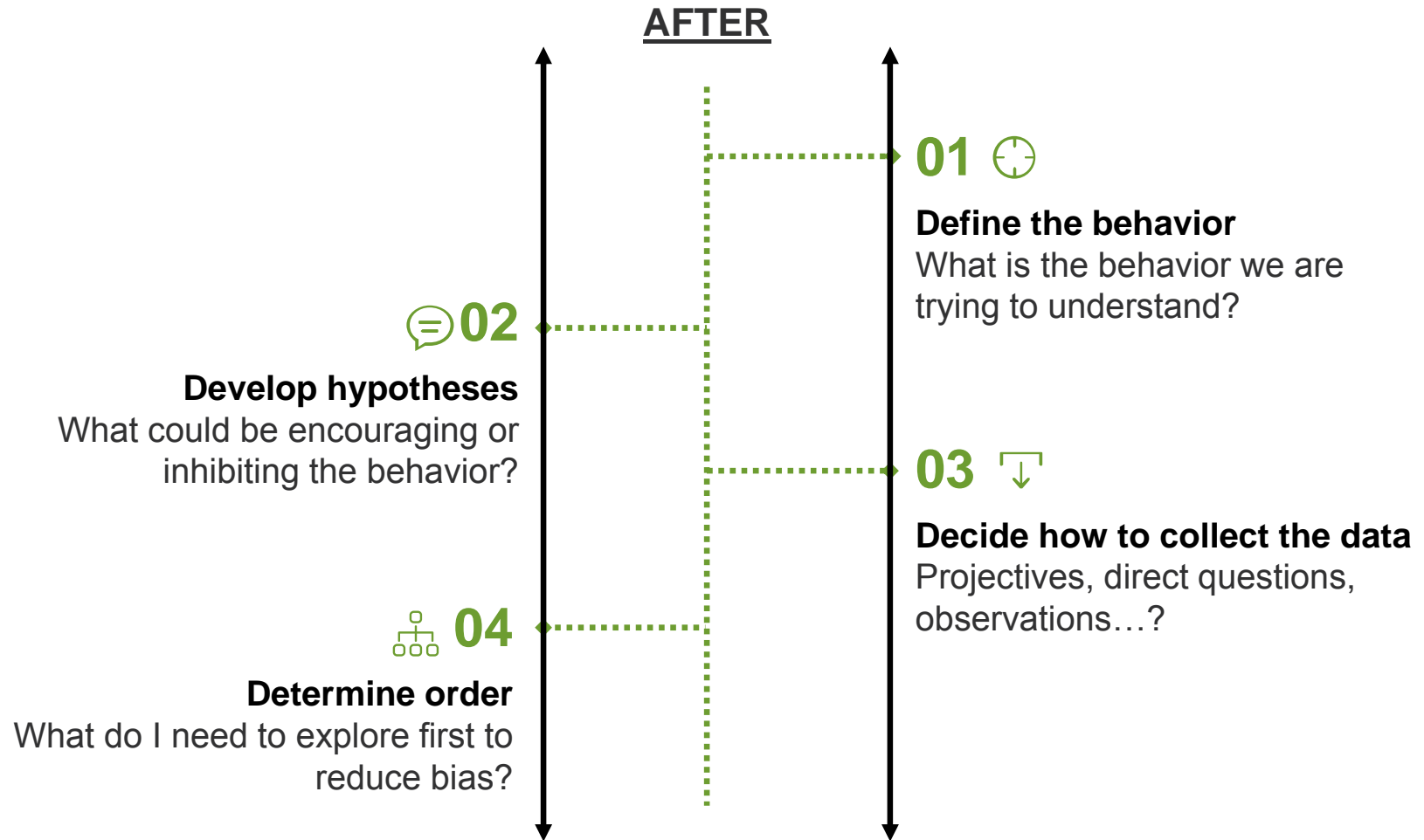


CONTRAST

AFTER

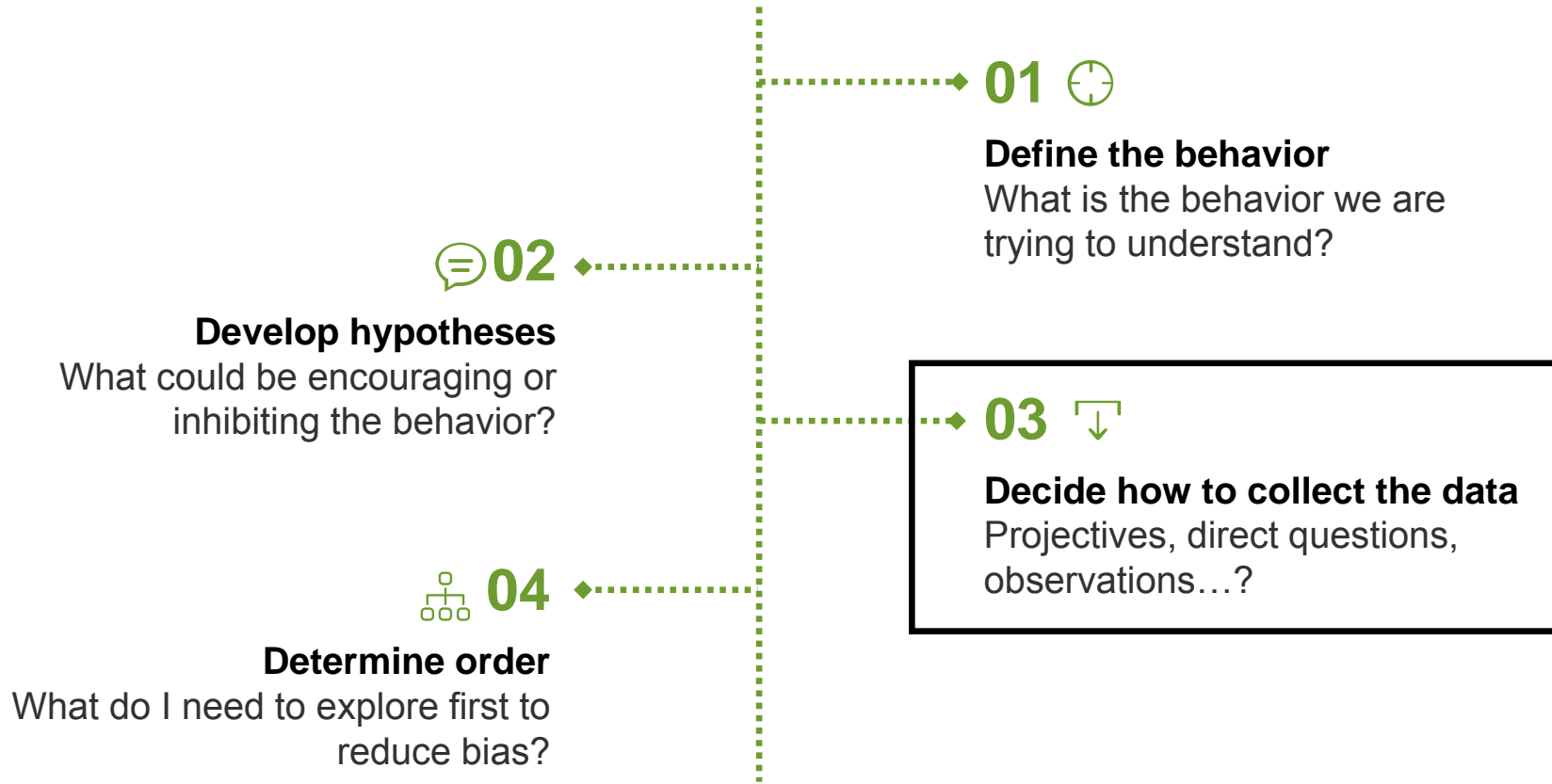


ALIGNMENT



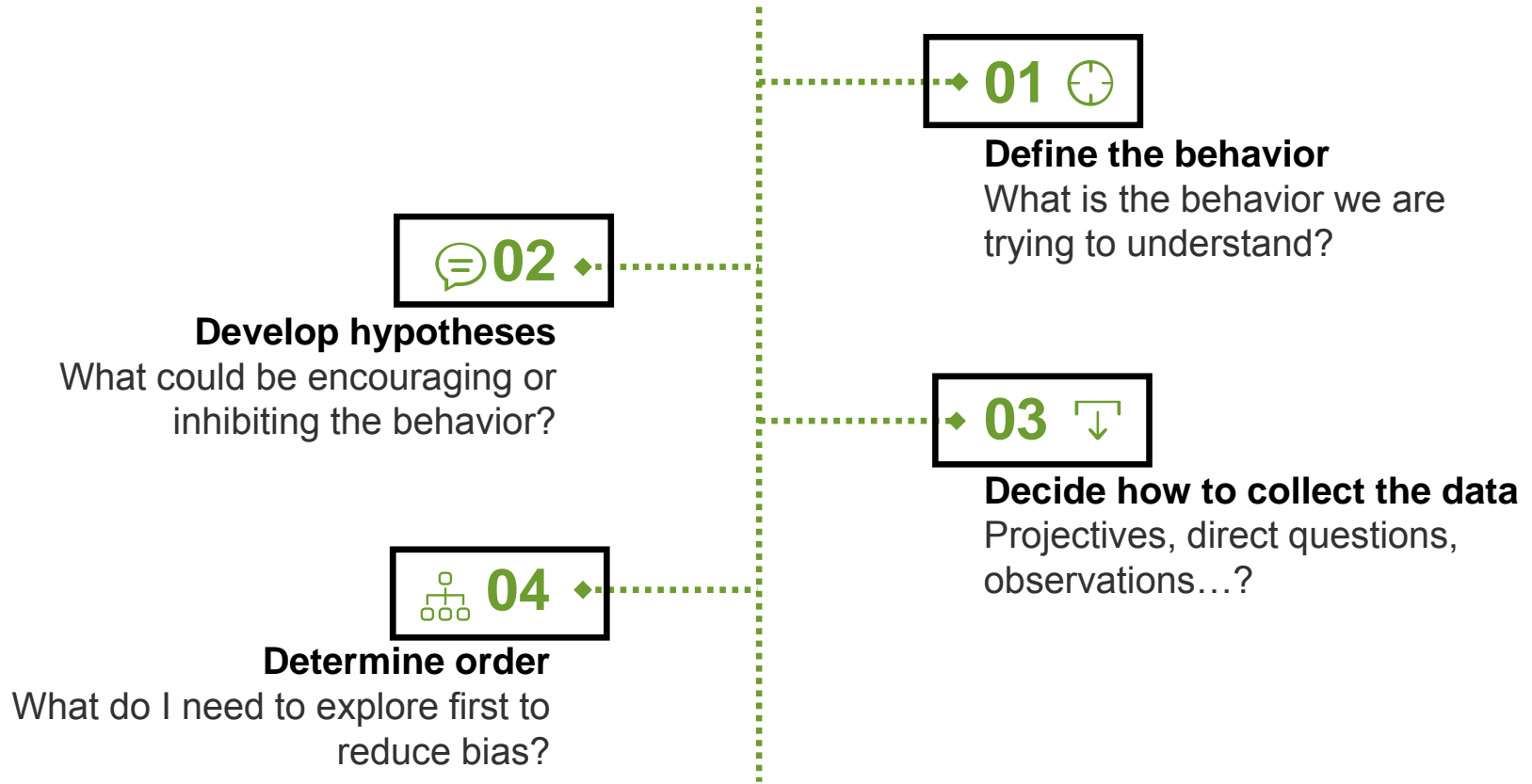
PROXIMITY

AFTER



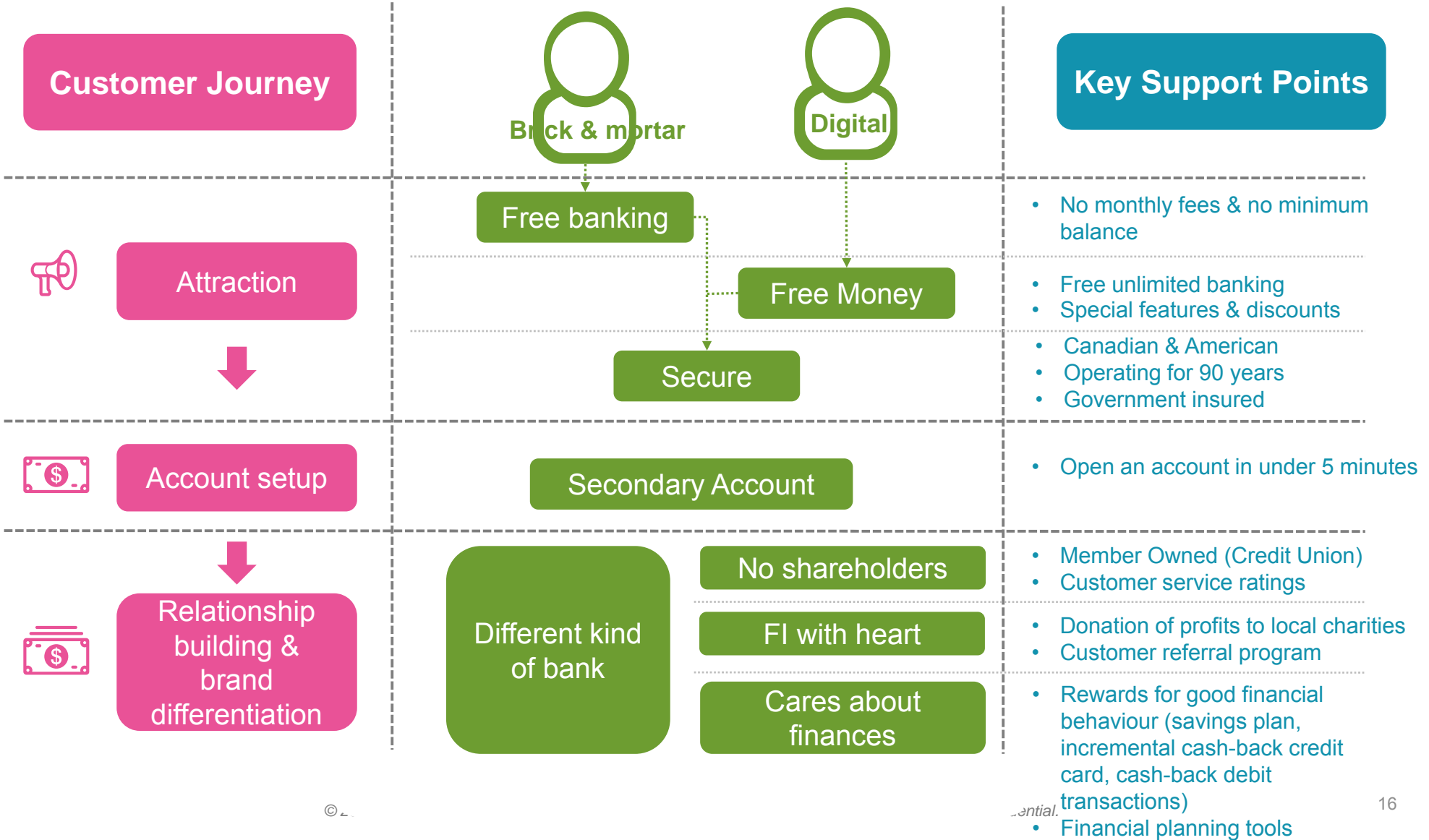
REPETITION

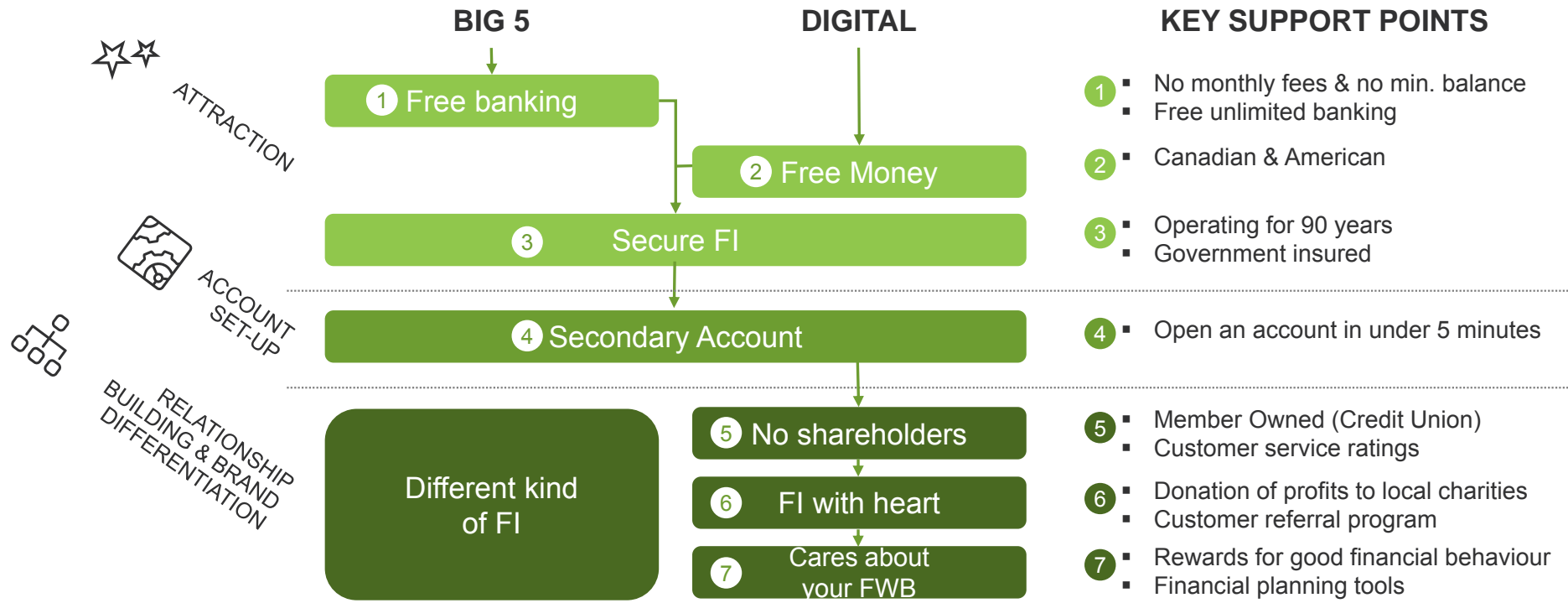
AFTER



Customer Journey

Key Support Points





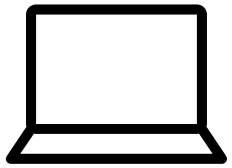
Slide 17

FA58 Revised slide building up
Frankie Aeng, 4/3/2018

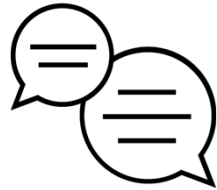
DEMONSTRATING COMMITMENT TO THE PROJECT



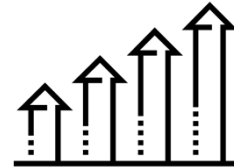
FIRST LOOK



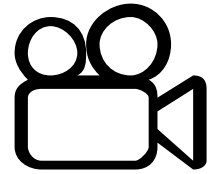
Secondary research



IDIs with your network



Google Surveys



Vox pop intercepts

FIRST LOOK – EXAMPLE

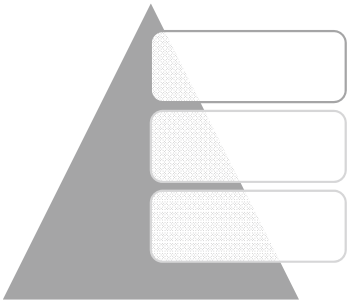
We are so enthusiastic about working with you that we have already conducted some preliminary research through our personal networks.

- 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



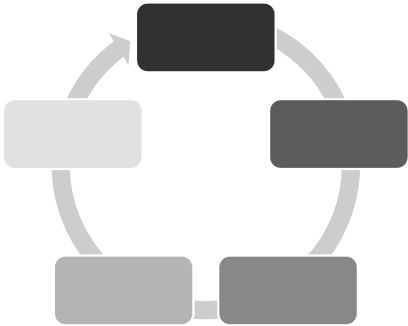
Linear, sequential process/flow



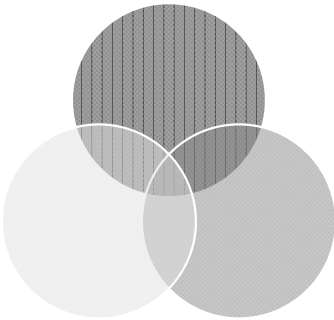
Pyramid



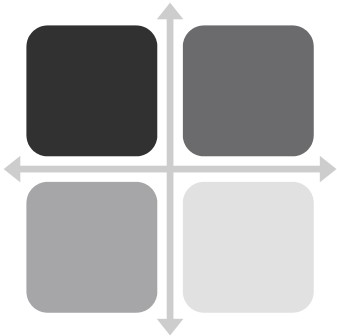
Stages



Cycle



Venn diagram



2x2

DEVELOPING HYPOTHESES

Attitudes to smart homes likely depend on:

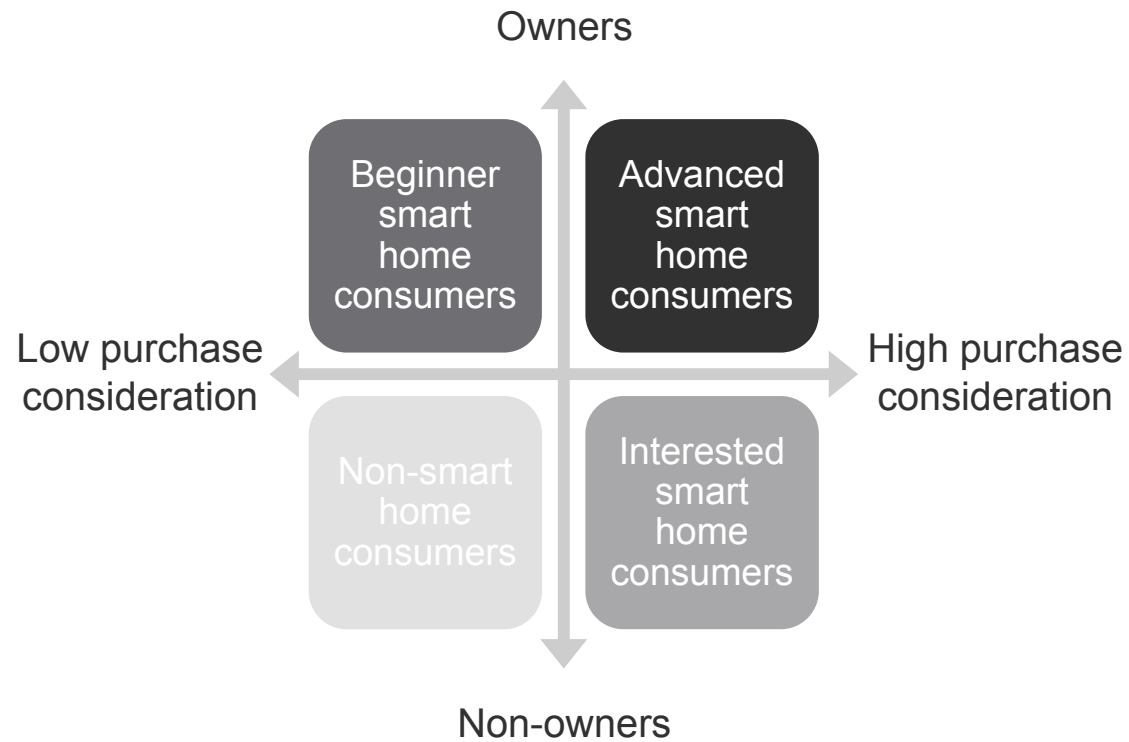
**Ownership of
smart home devices**

Those who own the tech will know more about it than those who do not

**Likelihood to consider
(re-) purchasing smart
home devices**

Those who are likely to consider are more likely to see value in the tech than those who are not

CREATING MODELS / FRAMEWORKS – EXAMPLE



SHOWCASE YOUR PASSION IN OTHER CREATIVE WAYS



Team bios



Experience



Deliverables

SHOW, DON'T TELL



SHOWCASE YOUR PASSION IN OTHER CREATIVE WAYS – EXAMPLE

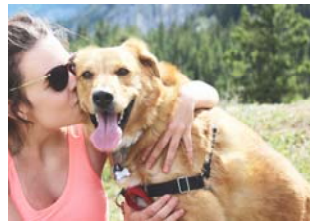


Kiba & Yuki

- 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).

PHASE 01 - ONLINE SURVEY: MARKETING PERSONA – EXAMPLE

Don 29, SINGLE (DRIVEN ENTREPRENEUR)



City:
Vancouver



HH Income:
\$120K



Services to target:
All



of Employees:
2



Sector:
Business consulting



Work week:
50 hours+

“I am worried about my business cashflow. Being a small company with international clients means I need flexibility.”

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.

TYPE OF BUSINESS OWNER



DON AND HIS EMPLOYEES

BUSINESS EXPENSES

Travels frequently	Low overhead costs	Technology purchases
--------------------	--------------------	----------------------

MOTIVATION FOR CONSIDERING

Price	Convenience	Lower expenses
-------	-------------	----------------

OFFICE EXPECTATIONS

High reviews	Quiet environment	Dedicated secure area
Ergonomic chairs	Use of meeting rooms	Use of common space

LIFESTYLE

Tech driven	Highest use of shared economy	Travels often for work and pleasure	Active/ outdoors
Social activities revolve around University friends	Frequently prioritizes work	Owns home	Uses transit for commuting

LIKES

Job	Skiing	Netflix	Eating out
-----	--------	---------	------------

BRANDS



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!

Nicole Aleong, nicole@luxinsights.com

Lauren McCrae, lauren@luxinsights.com

APPENDIX



SECTIONS OF A GOOD PROPOSAL



GENERALLY NEED TO INCLUDE...

- 01 Cover letter: Why choose Lux
- 02 Background & objectives
- 03 Team, experience & testimonials
- 04 Approach
- 05 Deliverables
- 06 Timelines & cost