CREATING WINNING BIDS AND PROPOSALS
Hints and tips to help you win more business!

Fact sheet – Using graphics to create winning proposals!

Introduction to the use of graphics in a proposal

There are many great reasons for using graphics in a proposal. Two things they're most definitely not, however, are 'eye candy', to make a proposal look pretty, or page fillers, when there appears to be too much text! In fact, graphics are a very powerful weapon in a bid/proposal manager's armoury. If used appropriately, graphics will turn a mediocre proposal into one that will win.

Although many of the principles for use of photographs are similar, these are not included in here. There is a separate podcast and fact sheet on how to use photographs in a proposal. Additionally, in this fact sheet, the term *graphics* also includes the use of tables.

Why use graphics in a proposal?

Although the list below isn't exhaustive, here are some good reasons why you should consider using graphics in your proposals:

- Graphics are proven to be one of the most effective ways of persuading the customer/the evaluator to select your solution. They give the reader a more in depth understanding of key points you are trying to make. Graphics also get across your thought process more effectively.
- Use of good graphics will grab the attention. That said, don't patronise the evaluator with simplistic graphics which show obvious things.
- Graphics have a multiplier effect in documents and can turn pages of dense text into something that's very accessible and easy to understand.
- Evaluators often skim documents and they look at graphics that stand out or grab their attention. They then read captions underneath the graphics, closely followed by headings in the proposal and other highlighted areas, such as call outs. Hence, evaluators will often form an impression based on what they've seen in a section, rather than what they have read.
- Good graphics leave an overall positive impression. They also convey professionalism and credibility to an evaluator.
- Never forget that evaluators talk to each other during evaluation processes. They will often ask each other things like 'Which proposal do you think was best then?' More often than not, discussions will include areas such as the use of graphics and other imagery to enhance understanding of a proposal.
- The use of graphics improves the retention of information in a proposal. Studies have shown that retention levels of very detailed information are much higher when gleaned from proposals and other documents that make good use of graphics.
- Evaluators aren't robots! All too often you hear authors of proposals say 'We don't need graphics because our readers are engineers and they're only interested in the facts'. Nothing could be further than the truth! All proposals can be made more interesting when using graphics.
- Readers expect to see graphics. Almost everything in the public domain that's read, contains graphics of one sort or another. Your proposal is no different.
- Studies show that proposals (and presentations in general) using graphics combined with well written text, are more successful.

- Graphics save using lots of text! This is particularly useful when you are working within the constraints of a word count.

When to use graphics in the proposal

Bid managers will have a wide range of ideas concerning when to use graphics in a proposal. Here are a few ideas gleaned over the years of producing proposals. Again, the list isn't exhaustive, and you'll have your own ideas. Consider the use of graphics in the following situations:

- Where critical information needs to be put across to an evaluator. Graphics supported by text will get the message across.
- When information is far too complex to be put across in words alone. Good use of graphics, supported by text, will enable you to put across even the most complex of ideas or processes. Additionally, this will help the evaluator understand your solutions and thought processes.
- When putting across Value Propositions (VPs)*. Whilst written VPs can be used in certain situations, graphics conveying your VP will always be more effective. (There is a separate podcast and fact sheet for VPs)
- Where you have an abstract idea to convey. For example, you might have been asked to 'describe' your implementation process, a customer service model, your approach to the social impact of you solution or how you approach CSR issues etc. Whilst you could, no doubt, explain these in words, these fairly abstract concepts are easier to show in a decent graphic.
- If you have a *flow* in a particular process. For example, a flow in a production process, a process for complaints resolution or a design process. These will all benefit from being put across in suitable graphics.
- When you've had a problem in the past and you want to show the evaluator that this has now been resolved. For

example, you could show how you've resolved the problem through a process flow, or you could develop a table showing a list of problems that you discovered and alongside each show how you solved them. A decent graphic showing this sort of thing will often give an evaluator confidence in the way that your organisation has resolved a past problem.
- Where you've identified *lists* of issues and you want to show how these are being mitigated in your solution. For example, you'll often be asked to identify potential risks associated with your solution. Giving a list of risks that you have identified, and then showing how you're going to mitigate each, will give an evaluator confidence in your thought processes. The same applies to areas such as Quality Assurance (QA) where you'll often be asked to identify areas of concern, showing how you'll mitigate each. A decent graphic will convey your thought process effectively.

How to plan graphics production during proposal development

The overriding principle associated with the use of graphics in a proposal, is that they need to be planned carefully and early in the proposal writing process. Graphics production should never be a secondary process, the output of which is inserted in a proposal after the writing has taken place. Additionally, they must never be used as just a method to 'break up text' that appears too dense.

Here are some principles to follow when producing graphics for your proposal:

- Graphics should be planned and developed before writing is started, being drafted in the early stages of the proposal production process. Sometimes, graphics can be drafted during the capture phase of a new opportunity by the Business Development (BD) team.

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- Some graphics lend themselves to being stored for reuse from one proposal to the next. For example, your production process might not change too much between one contract solution and the next and, hence, it can be reused. However, <u>great</u> care must be exercised when using the same graphics from one proposal to the next. It's essential that every time a pre used graphic is reused, a full appraisal of its effectiveness in the new proposal must be ruthlessly conducted.
- Ideally, an action caption should be written prior to designing the graphic. An action caption consists of a figure (or table) number, an informative heading and one or two sentences to describe the key message that needs to be put across to the evaluator. Don't be too concerned if the whole caption seems a little long.
- Graphics take time to produce. A simple graphic will take one to two hours to complete. Whereas, a complex graphic will take up to six hours to produce. Each one needs to be sketched out as a concept, then passed to a third party to assess its effectiveness. Once this process is complete, the draft graphic can be passed to, ideally, a graphic designer to produce the final solution.
- Test out the graphic, including its action caption, and integrate it into your storyboarding process. Be very critical as to its overall effectiveness.
- Place the graphic in the proposal and see if the graphic plus the action caption is coherent and logical. This is particularly useful, once the text has been drafted.
- Keep the graphic very simple and easy to understand. Always apply the KISS principle! Try to keep all graphics uncluttered and concentrate on getting the key messages across to the evaluator.
- Consider using a customer's graphic, particularly in areas such as return on investment graphs, where the customer may have given you a graphic showing what they would like to achieve. Placing your own information on top of this, will make your solution appear attractive, and will give the evaluator a degree of comfort because they'll recognise their own graphic. Be careful, however, to ask for permission before using a customer's graphic. The person who produced the graphic in the first place still owns the copyright.

How to use the graphic in the proposal

Once you have a set of graphics to use in your proposal, you will want to use them for best effect. Here are a few ideas to help you achieve this:

- Always place the graphic on the page to achieve maximum impact. Often, this will be 2/3 of the way down a page, but it could be at the start of a page. Try to get a feel for the best place to position the graphic as you review the document as a whole.
- Test out the draft text and the graphic, together with its action caption, to see if the key messages are being made obvious to a reader.
- Always introduce the graphic in the text prior to showing it in the document. Conventionally, words in the text introduce a graphic by using its figure or table number. For example, use words like 'A diagram showing our mature customer complaints resolution process is shown at Figure 1 below'.
- Try to orientate graphics vertically, so that an evaluator doesn't need to turn the proposal on its side to see the content and read the action caption. This can be irritating to an evaluator!
- Try to avoid complicated foldouts for bigger graphics. Keep things simple.
- Avoid using too much text in the graphic itself. Use the action caption to put across key messages to the evaluator, not the text in the actual caption.
- As a rule of thumb, it is sensible to have a graphic (or another visual) appearing on every third page as a minimum.

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Summary and last thoughts

Graphics are an extremely powerful tool when used correctly in a proposal. They can turn a mediocre proposal into a winning one, if planned properly.

Great care must be taken to ensure that they're planned and developed in a timely and efficient way. **<u>Never</u>** be tempted to use graphics as 'eye candy', to make a proposal look pretty, or page fillers, when there appears to be too much text.

There are some excellent hints and tips on preparing graphics in ***The Shipley Proposal Guide***, available here and ***Writing Business Bids and Proposals for Dummies*** available here.

If you are interested in taking your professional life further in the world of bids and proposals, then I suggest you consider joining the ***Association of Bid & Proposal Writing Professionals (APMP).*** Further details of membership and professional development can be seen at their UK website here and at their USA website here.

Good luck and, as always, keep bidding!

* We'll be looking at VPs in more detail in later podcasts.