

# How to Write Effective Reports and Proposals

By Michael McTague

Any trainer who wants to make a greater contribution to the organization should pounce on situations like this.

It is Friday afternoon. Six copies of a finished proposal, satisfying all the conditions of the 37-page request for proposal, must be on the client's desk by Tuesday, 11:00 a.m. sharp. The proposal is worth \$16 million and if successful will completely reverse the company's dismal showing of the last three years. But three of the eleven planned segments have not been started yet. Six are being rewritten by project team members. Some of the members are arguing heatedly across the hall and breaking everyone else's concentration. In another office, the manager of the word processing center is complaining to a team member that his people cannot continue to retype sections as quickly as the team demands. Two writers from the marketing department are on their way over to help complete the final proposal draft. These writers are not familiar with the project, but top management thinks they may rescue the floundering proposal.

This type of scenario—the writing nightmare—has become more and more common in the modern organization, and for many reasons. Corporations are operating in an increasingly competitive marketplace, and even those with long, successful track records in bid submissions find that smaller competitors are gaining ground—not necessarily by offering superior products but by writing skillful proposals. Creating effective reports and proposals within the com-

pany is also becoming important: increasingly, staff groups, unaccustomed to the writing process, are required to propose business services and to report committee findings, etc., to their internal clients.

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## How many times have you been bored or mystified by an internal report? This is where trainers can seize the opportunity

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The writing process creates considerable frustration for everyone involved. Many managers hear proposal team members saying that they're sure the firm can do a better job than its competitors. They doubt, however, that their proposal will convey technical superiority. And how many times have you been bored or mystified by an internal report?

This is where trainers can seize the opportunity. In trying to avoid the writing nightmare, the trainer's abilities to organize projects, to assemble needed human resources, and to capitalize on their overall knowledge of the firm could be vital assets.

### The mistake of technique

More often than not, however, corporate writers are parachuted into the last stage of the project to improve the quality of the final document. These writers try to create a simple and powerful piece by applying the skills they know best, such as:

- *invigorating the language*—using adverbs, adjectives, and active voice to change the dull "Productivity will be increased by at least 5 percent" into the

brighter "This high technology venture significantly impacts productivity."

- *shortening sentences and paragraphs*—taking from the spare style of Hemingway and ripping out needless punctuation, useless phrases, and redundant sentences, thereby halving the length of the average paragraph.

- *creating a technical appendix*—removing everything complicated from the body of the proposal and placing it at the end, in a "Technical Discussion," so that busy executives in the client company are not bogged down with complex issues.

- *writing an executive summary*—encapsulating the basics of the proposal in a few hundred simple words that provide the correct impetus for a positive decision from the client.

But will this skillful editing at the last minute move your proposal from mediocrity to unparalleled superiority? Based on our observations of hundreds of proposals and reports, we don't think so. Companies that write multi-paged requests for proposals will not be convinced by one-page summaries. Technicians who review your response will not be mesmerized by simplicity.

Human resource professionals will see the weakness of this knee-jerk solution to the scenario above: quick fixes do not work. Last-minute editing by writers not part of the team providing the services or not directly involved in the completed project will not show the true strength of the organization. Corporate writers can achieve situational success by creating a good-looking document, but ultimately this success is limited. None of their remedies addresses the underlying causes of inadequate proposal and report writing.

The underlying reason for most lifeless reports and timid, ineffective

McTague is president of Michael J. McTague and Associates, P.O. Box 1128, New York, NY 10471.

proposals is the writer's inability to put on paper the force and clarity of the idea he or she wishes to express. You will see this problem when a colleague says, "I can't do any more rewriting. I'll explain it better in the oral presentation." A member of the project team may discuss in detail the challenges of a product modification, including the technical aspects of manufacturing changeover, but will produce a simplistic and occasionally garbled written explanation. Or, the tough-minded project manager who draws from a deep reservoir of experience in his or her organization of the project team will produce a sanitized, colorless "summary of the main points."

Significant improvement in the writing of reports and proposals is within the reach of hundreds of managers and technicians who now approach writing with fear and trembling. Here is the true HRD challenge: unlocking the knowledge and experiences of the people who achieve the goals of the project.

### The 10-step process

Training programs that approach writing simply as a series of techniques separate from the development of an idea gloss over the real symptoms of inadequate writing. To achieve significant improvement demands a solution to the root problem: the gap between thinking and writing.

In the writing process, the idea you are trying to express evolves, comes into sharper focus, and gains force during the act of writing and rewriting. There is a constant give-and-take between the idea and the set of techniques. The challenge for the trainer is to improve both the thinking and the writing skills in the organization.

The following is a 10-step writing process used in more than a hundred companies that have launched more than a thousand projects. While there are no secrets in this format, following it step by step can create significant improvements in proposal and report writing.

**Steps 1 and 2: Define the Writing Task and State the Guiding Principles.** These steps provide a sense of direction that brings together the writing team's initial thoughts about the project. While the elements of these steps can be modified as the writing proceeds, they focus on the early writing effort.

One proposal writing team—we'll call the company it worked for Clear Graphics Monitor, Inc.—responded to Step I this way:

■ **Purpose**—Complete new software services proposal by October 1.

■ **Title**—Creating and Implementing Analyzer Software for Clear Graphics Monitor, Inc.

At the first meeting of the full team, they devised eight guiding principles: ■ to provide a technically detailed description of how Clear Graphics Monitor will meet the requirements of this request for proposal;

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■ to position the company as a high-technology leader;

■ to indicate how the company will use local resources to complete the project;

■ to provide a complete cost justification for all parts of the project;

■ to limit each of the eight technical segments of the proposal to 20 single-spaced pages;

■ to complete the first draft by September 10, and the final proposal by September 25;

■ to avoid any suggestions to the client about possible marketing of the product;

■ to achieve the corporate target of a 15 percent return on investment.

We recommend between two and seven principles, which should summarize the major criteria for judging the finished document. In the example above, the last two principles were eliminated, and the remaining six became the official guiding principles for the proposal. In turn, teams tackling individual sections of the proposal revised the list to suit their needs.

**Step III: Develop a Key Point Outline.** Making an outline is often required in school and widely recommended by writing trainers. In practice, however, few business writers use outlines. Most prefer to plunge into the writing and deal with such issues as

consistency and completeness later, if they do it at all. Outlines tend to work best when the writer understands the task clearly. For example, writing on topics with which the writer is familiar—an historical summary of a product idea or a summary of existing articles and books on a defined subject—can be facilitated by fifteen minutes of outlining.

A stock issue outline helps many proposal and report writers:

*Stock Issues:*

■ Describe the need.

■ Tell how it has been (or will be) achieved.

■ Define the benefits that have been (or will be) achieved.

**Step IV: Assemble Needed Resources.** This step is the most often overlooked. A quick-thinking trainer can begin Step IV early in the project, between the receipt of the request for proposal and the formation of the proposal team. It may require only a short memo letting others know what is coming, such as the deadline, scope of the project, and resource needs. A necessary action here is to arrange for the right people to be available to review the first draft.

**Step V: Write the Piece.** This is the heart of the matter and the hardest part of the process. Here, trainers most often play the role of official psychologist. Claims of writer's block are exaggerated in the business world; team members suffer more from the fear that their writing will be inadequate. But first drafts, you must counsel, are not expected to be perfect. There will be plenty of opportunity to create a masterpiece by rewriting and refining.

If the team members follow the four previous steps, the writing will be considerably easier. Advise them to use the outline and glance at the guiding principles, the purpose, and the suggested title.

**Step VI: Review the First Draft.** This step brings the writer back in touch with the needs of the project. A systematic review of a first draft looks at the broad issues—how well the guiding principles and outline were followed—as well as the technical issues—spelling, style, and technique. Advise writers to review their first draft, judge it by their own standards and expectations, compliment themselves on successes, and uncover new challenges. Less successful reviews of first drafts reach conclusions like, "I just



can't write well." Successful reviews lead to specific conclusions on which writers can act, such as, "I need to explain more clearly why our company is superior technologically."

Advise your colleagues to read first drafts by trying to put themselves in the position of those who will read the final draft. How well does a proposal

■ answer the questions in the request for proposal?

■ position your firm against competitors?

As a rule of thumb for a proposal, write more than the minimum required to convince a reasonable person. Provide related examples of success and stress documented results. Offer a pointed discussion of the theory that underlies the proposed methodology. Cast light on the shadows in the theory.

Reports, on the other hand, should say less but be more emphatic in their conclusions. The reader generally knows why the project was undertaken and has some idea of what happened during the project. Approach the early history of the effort as background information. The foreground of a report

■ offers proof of the project's success, stressing financial or other measurable results;

■ recommends policies or follow-up projects based on the project's success;

■ admits weaknesses and suggests remedies;

■ focuses on actions taken and still to be taken;

■ provides reward for the appropriate players.

**Step VII: Rewrite.** This step can be repeated, according to your schedule. Recommend rewriting at least once before the team shares the draft with people other than its members. Outside comments received on a first draft are typically too far-ranging and often too critical to be useful.

The first two rewrites should focus on clarity and completeness. Together, the writers should strive to bring the written document in line with their own thoughts, explore gray areas, share unique experiences, offer insights and opinions, and place their own personal stamps on the piece. This back-and-forth search for clarity in the written idea helps the technician to produce a document of great depth and conviction—of greater depth and conviction than the document written

by the corporate writer, who is unfamiliar with the project. By the same token, the senior executive can infuse the piece with his or her perspective, rather than accept the colorless first draft that often passes for corporate journalism.

Two or three rewrites provide a solid draft that can be shared with colleagues.

**Step VIII: Refine the Draft.** Here, you want to get more input and to fine-tune a document that will convince the client of the superiority of your approach. As trainees become trusted members of project teams, they themselves may wish to make suggestions for improving the document.

**Step IX: Prepare the Final Product.** This step concentrates on the physical qualities of the document—overall design, graphics, etc. In terms of graphics, here are a few suggestions compiled from some recent reports and proposals:

■ include one graphic for every five pages of text;

■ include short descriptions of each graphic;

■ vary graphic colors to clarify relationships among the data;

■ keep a consistent format from graphic to graphic.

**Step X: Assemble Feedback.** Once the proposal or report has been released, identify three or four major reasons why the proposal was accepted or the report praised. If the outcome for the proposal or report was positive, this step can invigorate the writer for the next challenge. If the proposal was not accepted, obtain a copy of the successful one; if the report did not go over well, find out why. This step often is overlooked and is a major opportunity for trainers.

### Writing and thinking

Following these 10 steps can help all business writers to bring their writing closer to their thinking. In the end, good writing is the result of considerable effort and must be a part of one's thinking as water is a part of the body. It is easy to go for the simple solution, to use professional writers who have only a cursory knowledge of their subject. But when that solution falls flat, you will find that comprehensive human resource development programs build real writing skills and make the real contributions to successful proposals and reports.

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