

Guideline

SMPS/GBC

Brand Image Research Project

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Objective & Methodology

Objectives

Proposal Developers

- Identify the developers of presentations/proposals
- Determine the drivers of the format used for proposals
- Identify the consistency or amount of customization of the development, packaging, and delivery systems for proposals
- Uncover the limitations faced in proposal development
- Determine the amount of time and money spent on the proposal process including content and packaging
- Determine the role of corporate branding
- Measure the delivery systems for proposals, electronically or hard copies
- Determine the impact of presentations and proposals on ROI

Proposal Reviewers

- Identify the reviewers and final decision makers for proposals
- Determine the preference for proposal delivery, electronically or hard copies
- Uncover the number of proposals reviewed, on average, for each project and the reasons for that number
- Length of the proposal review cycle
- Driving factors in the selection of the final proposal for each stage (first glance, first review, in-depth review, final decision)
- Measure the importance of Brand in the proposal review process

Methodology

- 1,029 Developers were surveyed over the web. A pre-notification email and follow-up email invitation were sent to the entire Developer sample.
- Developers who completed the survey were then invited to send an invitation to their clients. 74 Proposal reviewers completed the online survey.
- Data collection took place between December 21, 2006 and January 15, 2007.
- Amazon gift certificates were given to those who completed the web survey. An additional Amazon incentive was given for those developers who had a client complete the web survey.
- Error margins for the total developer responses is +/- 2.9%. Error margins for the total reviewer responses is +/- 11.4%.

Executive Summary

Proposal Developers

Most respondents that we spoke with develop both qualification and fee based proposals. Qualification based proposals are lengthier and take more time to put together. Qualification based proposals are generally put together for government, cities and schools. Fee based proposals are more likely put together for projects on office buildings, hospitality/entertainment, and residential buildings. Marketing coordinators, marketing directors, proposal managers, business development managers, and graphic artists are more involved in qualification based proposals. Project managers, principals, and project engineers are more involved in fee based proposals.

Branding

1. Almost all proposal developers that participated think that it is important that their proposals portray and represent their company's brand. Interestingly, only a third think that their overall brand has a large effect on moving their proposal to the final stage of review. Logos, unique services, key messages and company colors are the areas of their brand that are communicated most within their proposals. Proposal developers distinguish their proposals from others by using their company name or logo, color scheme, and graphic design or layout. Some mention that their proposals are differentiated by the layout of their proposal template, the fact that they emphasize uniqueness and differences from their competitors, and their own company history, values and qualifications. Respondents believe that a proposal's content and format are the largest contributors to the branding of their proposals. They also ensure these two areas represent their brand.

Content

1. Overall, content is thought to be the most important factor for getting to the next stage of the proposal review process. Project experience, approach, resumes, technical approach, references and unique services of the company contribute to a proposal's content and are thought to be most important for getting a proposal to the next stage. Customization of this content occurs across different levels of a proposal including the cover letter, project approach, experience, organizational chart and resumes.

Format

- Format is seen as important for getting to the next proposal stage by about half of proposal developers. Formatting is driven by RFP specifications, ease of understanding, ease of client use, consistency across the document and the need to stand out from the competition.

Executive Summary

Proposal Developers

Packaging

1. Packaging is thought to be less important for proposals - only a third of proposal developers think this is important for getting to the next stage in the review process. The timing of the decision process for packaging varies. About half of respondents make this decision in the early stages of the process, while a quarter do not discuss this at all since packaging for them is always standard.
2. Hard copy proposals are used most often and a coil, comb, or wire bound document is most popular. The majority of proposal developers use stock color and a non-customized binding element. For hard copy proposals, express delivery service is preferred.
3. Almost all respondents customize either the cover or backing. Half create laminated covers or backs and one in five order preprinted covers or back with company information or brand identity. Card stock is the most commonly used material. Almost all developers also use card stock tabs and half of those who develop proposals create these in house.
4. Packaging is primarily driven by RFP specifications, ease for client use, the need to impress a client, stand out from the competition, and convey their brand image.

Limitations

1. Time is the largest limitation mentioned by proposal developers. Deadlines and staffing are secondary factors. Lack of teamwork, cost, equipment and company materials are also mentioned. Compiling all of the necessary information for the proposals is the biggest challenge. Meeting deadlines and commitment by all team members are secondary factors that are mentioned.

Executive Summary

Proposal Reviewers

Most client reviewers that participated in our study were marketing directors, coordinators, project managers, account executives, engineering/construction facility managers, or principals. There was a cross representation of industries with a large number in schools or office buildings. Those that participated are involved in various stages of the proposal review process.

The number of RFPs sent out by these clients varies. Just under a third of reviewers that we spoke with send out only one RFP while another third of clients send out two or three RFPs. One in five reviewers send out six or more RFPs. Most reviewers that participated require qualification based proposals and three quarters did not have a minimum number of RFPs to send out. A similar number of RFPs are returned and almost half of these proposals are ten pages or less. The review stage is generally in depth – almost two thirds of respondents say the process has three or more stages and takes six or more days.

When asked what makes a proposal stand out, the layout and organization of the proposal is mentioned by three quarters of client reviewers. The costs, cover, length and branding are mentioned as secondary factors.

Branding

1. Overall, a third of clients feel that brand is very important when deciding between various proposals. Many feel that brand is tied with a company's quality, history, and performance stability and therefore find it important. A quarter of reviewers believe that it has a large effect on moving a proposal to the next stage.
2. Three in five clients find it necessary to have a proposing company's name or logo throughout the proposal. Most prefer having this just on the cover or footer of the proposal.
3. When asked about the different components of brand, the unique services offered by a company are most important for someone reviewing a proposal. A company's key messages and corporate value proposition follow, but are much less important. Interestingly, company colors are least important brand factors for those reviewing proposals.

Content

1. Overall, almost all respondents find content as the most important factor for moving a proposal to the next stage. The underlying most important criteria for those reviewing proposals is that it has answered all of the RFP questions. It is also highly important to have relevant project team experience, a timeline that meets deadlines as well as the overall project approach. Secondary factors include format, experts involved, quality control procedures and the technical approach.

Executive Summary

Proposal Reviewers

Format

1. One in five reviewers think that format is very important for moving a proposal to the next stage. A third of reviewers think that specific photos, graphics, or illustrations have the most impact. About one in five reviewers mention page layout (portrait or landscape), paper size and headings used as being important.

Packaging

- Almost a quarter (22%) felt that packaging had a large impact on moving a proposal to the final stage of the review process. Receiving both hard and electronic formats is preferred. Two in five clients do not have a preferred delivery method for hard copies and a third prefer an express delivery service. Three quarters prefer email for electronic copies. Four in five reviewers prefer bound documents – preferably coil binding. Interestingly, only one in seven clients find that differentiated packaging makes a large impact.

Executive Summary

Comparison

In comparing responses between Proposal Developers and Reviewers there are some inconsistencies. Looking at overall measures, branding, format, and packaging are less important to reviewers compared to proposal developer's impressions. Content is also much more important to clients compared to developers.

Importance of:	Developers %	Reviewers %
Brand	36	23
Content	72	85
Format	45	20
Packaging	34	22

Content: Both agree relevant experience is important. Timeline is more important for clients than anticipated by developers.

Brand: Logo and colors are not seen as important for clients. Unique services and key messages are more important.

Format: Specific photos, graphics, and illustrations are most important to clients and also what is customized most by developers.

Packaging: Packaging and delivery methods receive similar scores for both groups.