

**BUILD
BUSINESS.™**
Politics at Work

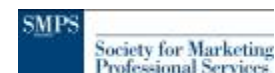


Seven Habits for Highly Effective Proposal Development

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Hosted By:





Learning Objectives

In this session, participants will learn how to apply the following seven habits in order to create highly effective proposals:

1. Be aware of proposal development trends
2. Understand the perceptions of proposal reviewers
3. Seek client advantage
4. Acquire corporate-wide support
5. Leverage internal resources
6. Leverage external resources
7. Manage your brand



GBC/SMPS Research Study

- Pre-Survey
- Developer trends and reviewer perceptions
- SMPS Audience
 - Industry: Construction, Architecture, Engineering
 - Representative of the industry: position, annual sales, number of locations



Types of Proposals Written

Types of Proposals	%
Qualification Based	28
Fee Based	2
Both Fee and Qualification Based	70
Average Number of Pages for Proposals	
Qualification Based	41
Fee Based	19
Average Number of Hours Putting Together	
Qualification Based	40
Fee Based	23



Habit #1:

Be Aware of Proposal Development Trends

- Branding
- Content
- Formatting
- Packaging
- Budgets and Limitations



Branding

- 90% of proposal developers think it is very important that proposals represent a company's brand.
- The majority of proposal developers think that brand has a moderate effect on moving a proposal to the final review stages.



Branding

- Areas of brand most communicated in proposals

Logo	95%
Unique Services of Company	88%
Key Messages	77%
Company Colors	74%

- Communications that are consistently branded

Letterhead	91%	Brochures	82%
Business Cards	89%	Website	75%
Envelopes	84%	PowerPoint Templates	63%



Branding

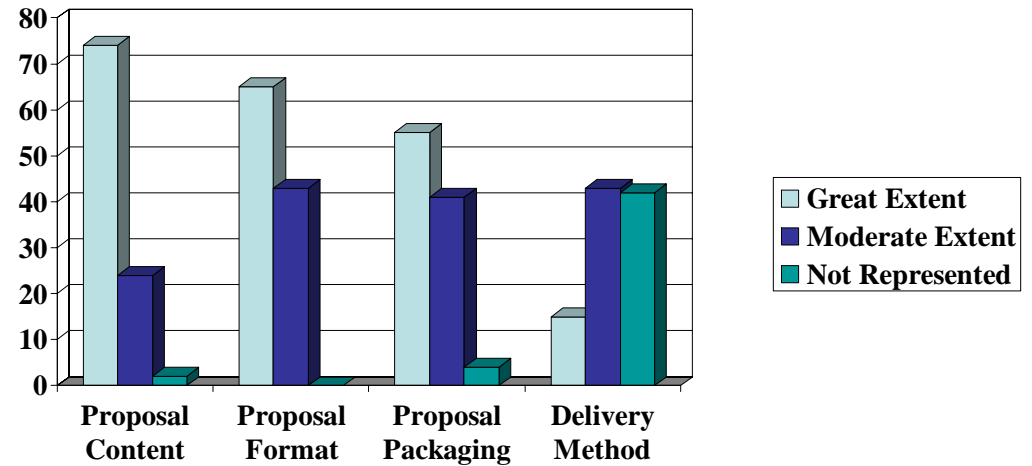
How do developers distinguish their brand from other companies?

- Logo/company name/brand
- Color scheme/graphic design/layout
- Layout template/standardization/consistency
- Emphasize uniqueness & difference from competitors/specialty services

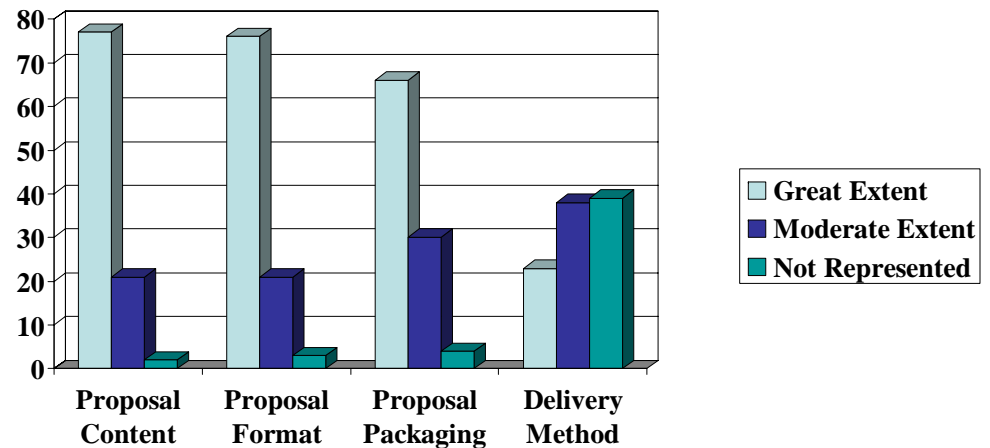


Branding

To what extent are the areas of content, format, packaging and delivery methods considered to contribute to the branding of a proposal?



To what extent do developers ensure their brand is represented in these areas?





Content

- 72% of proposal developers believe content has a large effect in getting proposals to the final review stage
- Project Experience and Project Approach are the areas of content thought to have the most impact for moving a proposal to the final review stages
- Top three most time consuming content areas to develop
 - Project Approach
 - Technical Approach
 - Project Experience/Relevant Projects



Content

- Content most often customized

Cover Letter	87%	Organizational Chart	75%
Project Approach	86%	Resumes	75%
Project Experience	80%	Timeline	65%

- Most often used content

Company Overview	96%	References	90%
Resumes	96%	Table of Contents	87%
Cover Letters	96%	Unique Services	86%
Project Experience	95%	Organizational Chart	85%
Project Approach	92%	Timeline	72%



Format

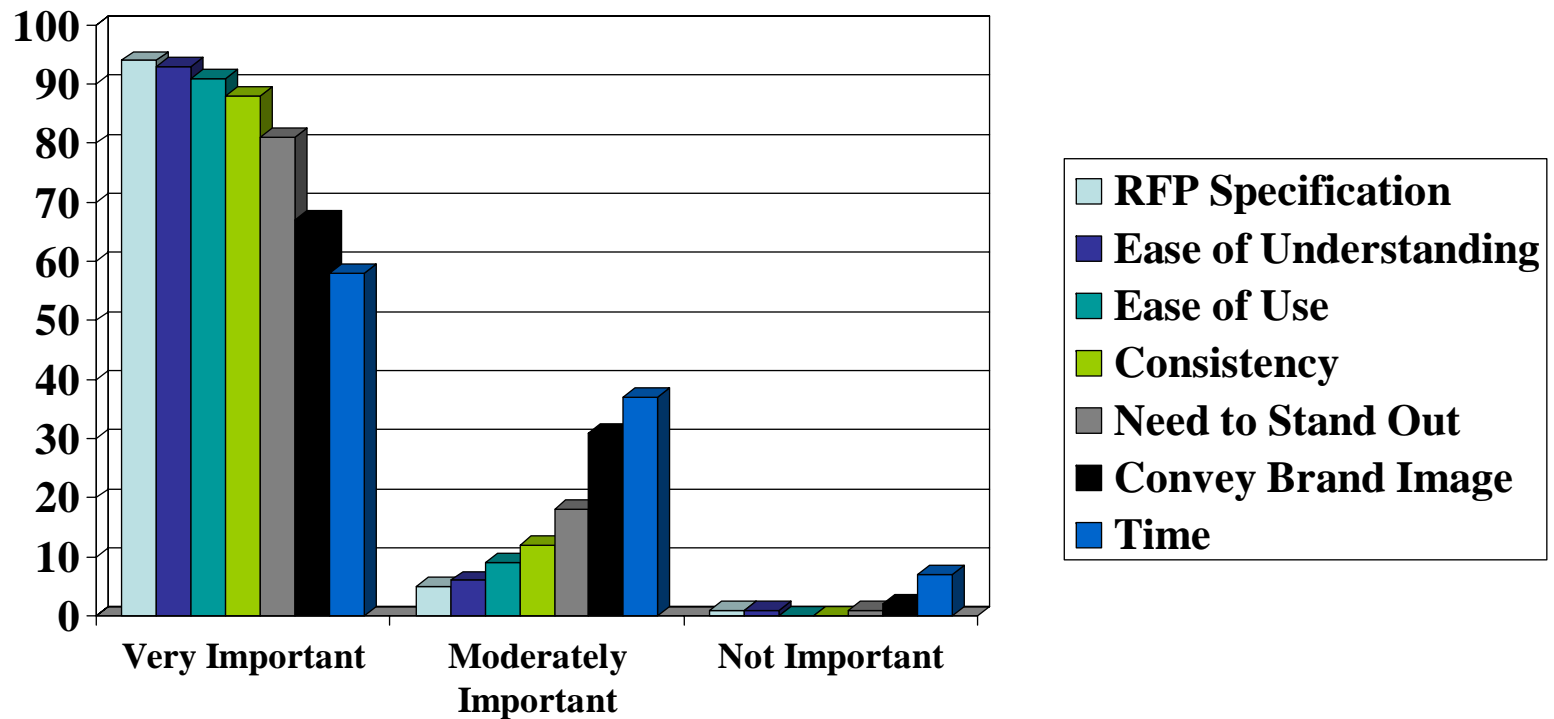
- 54% of proposal developers believe format has a moderate effect while 45% believe format has a large effect in getting proposals to the final review stage
- Format areas that are most often standardized

Company Logo Usage	93%	Page Layout	80%
Paper Size	89%	Font Size	79%
Font Type	84%	Color Used	70%



Format

Most important criteria for determining format





Packaging

- 62% of developers believe packaging has a moderate effect in getting proposals to the final review stage
- Most important criteria for determining packaging style

RFP Specifications	86%	Need to Impress	68%
Ease of Use	72%	Need to Stand Out	66%



Packaging

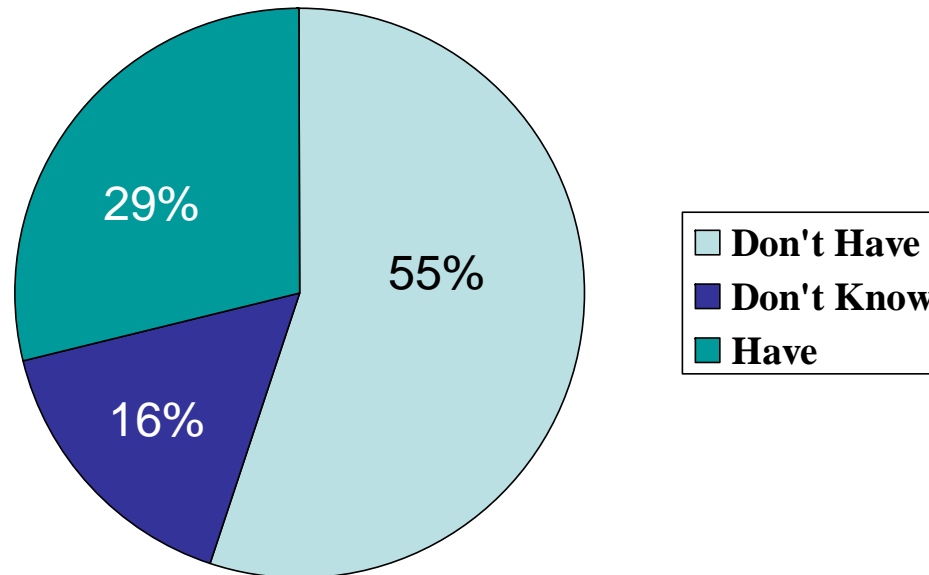
The majority of packaging is:

- Hard copy
- Printed in color
- Bound: Coil, Comb, or Wire
- Binding elements stock color, no customization
- Have tabs
- Covers and tabs are most likely card stock
- If covers are customized they are laminated and printed to match corporate colors



Proposal Budgets

Annual Budget for Proposal Development



Of the 29% that do have a budget, 32% do not know the amount.



Limitations and Challenges

- **Biggest Limitations**
 - Time
 - Deadlines
 - Staffing
- **Biggest Challenges**
 - Gathering information
 - Meeting deadlines
 - Commitment



Habit #2: Understand the Perceptions of Proposal Reviewers

Do proposal reviewers view brand the same as proposal developers?



Research Reviewer Demographics

- Position
 - Marketing Director/Coordinator
 - Project Manager/Account Executive
 - Engineering/Construction Manager Facilities
- Cross section of business types
 - Government
 - Cities
 - Schools
 - Public works/utilities
 - Office Buildings
 - Transportation
 - Hospitality
 - Residential
 - Hospital/Healthcare
- All required both Qualification and Fee based proposals



Reviewer Perceptions

- What makes a proposal initially stand out
 - Layout and organization
 - Costs spelled out
 - The proposal's cover
- Factors with the most impact on overall decision making
 - Proposal has answered all of the RFP questions
 - Relevant experience of proposed project team
 - Ability of the proposed timeline to meet client schedules/deadlines
 - Overall project approach



Perceptions on Brand

- 80% of proposal reviewers feel that a developers brand is either very important or moderately important in the decision making process
- 81% feel that a developers brand has a moderate to large effect on moving a proposal to the final review stage
- The three most important brand components to reviewers
 1. Unique services of a company
 2. Company's key messages
 3. Company's corporate value proposition



Perceptions on Content

- 85% of reviewers feel that content has a large effect on moving a proposal to the final review stages
- Most important content areas
 - Project experience/relevant projects
 - Project approach
 - Timeline/schedule
 - Executive summary



Perceptions on Format

- 72% of reviewers feel that format has a moderate effect on moving a proposal to the final review stages
- Most important format areas
 - Specific photos, graphics and/or illustrations used
 - Page layout
 - Paper size



Perceptions on Packaging

- 68% of reviewers feel that packaging has a moderate effect on moving a proposal to the final review stages
- All areas of packaging have little effect on the final decision process



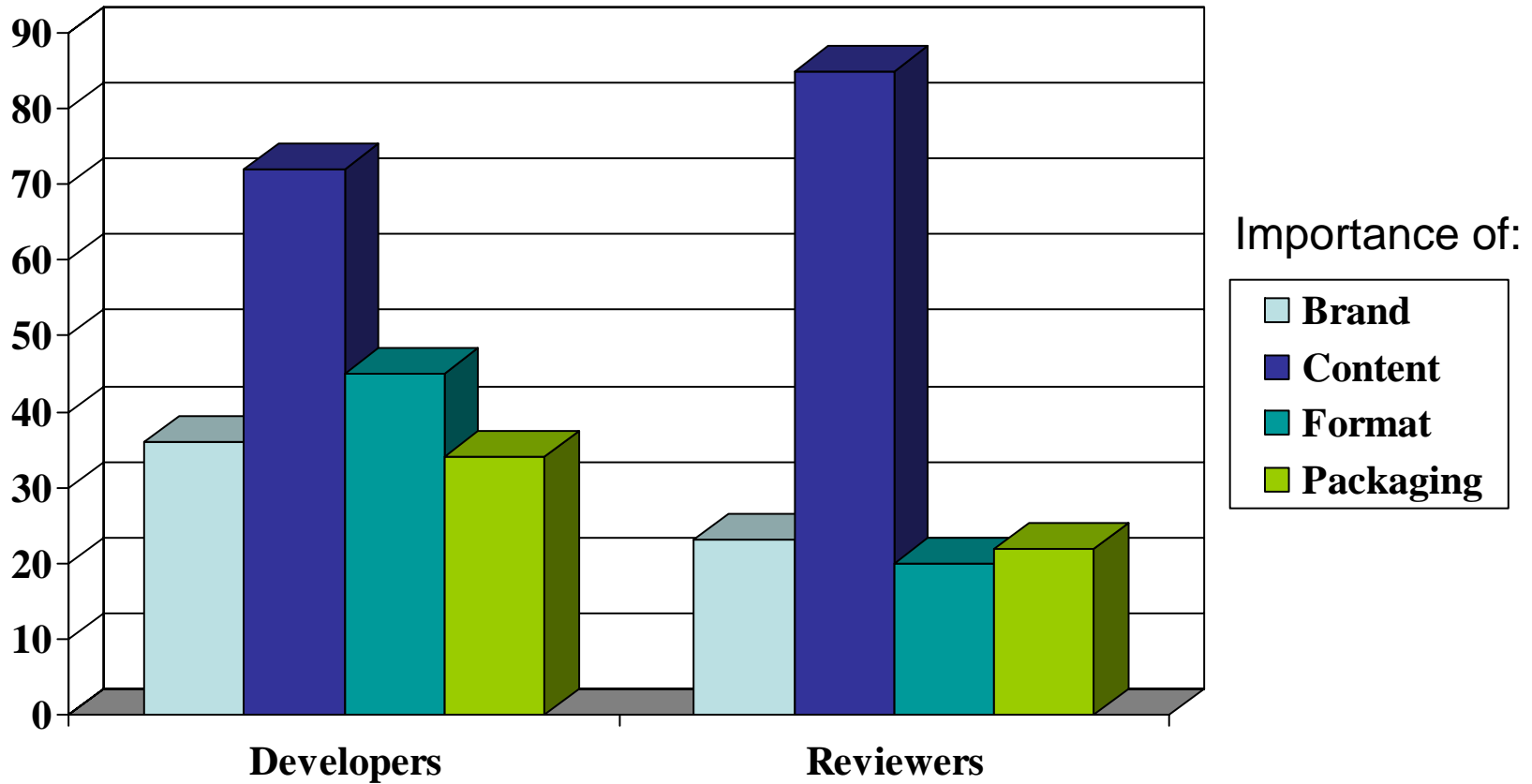
Perceptions On Packaging

- Differentiated Packaging
 - 68% see a moderate impact on proposal acceptance
 - First impression – care, creativity
 - Attracts attention

- Preferred Packaging
 - Delivery Method
 - Hard Copy / Electronic
 - Express Delivery
 - Email
 - Binding
 - Coil
 - Three Ring Binder
 - Comb
 - Wire



Comparison Summary





Habit #3: Seek Client Advantage

- Outside-In approach
- Understand client needs
- Know the marketplace and changing environment
- Proactive thinking/solutions
- Continuous client analysis



What is Outside-In?

- Outside-In is a “mindset” and “process” within your organization for *the pursuit of client advantage**.
 - Awareness of the ecosystem around you
 - “See” what is hidden in plain sight
 - Mega/industry trends that impact the environment
 - CHANGE BEHAVIORS while addressing needs/wants
 - Transforming your client’s experience





Habit #4: Acquire Corporate-Wide Support

- Conduct a brand audit
- Set-up communication channels
- Promote ownership
- Develop an interdepartmental team
- Get buy-in from top management
- Appoint or be a brand champion



Habit #5: Leverage Internal Resources

- Brand champion
- Web-based company-wide brand guidelines
- Centralized, web-based resource center
- Company brand webinar
- Quick Reference Guides
- Tools/Templates
- Employees



Habit #6: Leverage External Resources

- **Organizations**
 - Society for Marketing Professional Services (SMPS)
 - Business Marketing Association (BMA)
 - Association for Proposal Management Professionals (APMP)
- **Books**
 - *Hidden in Plain Sight* by Erich Joachimsthaler
 - *The Outside-In Corporation* by Barbara E. Bund
 - *A Whole New Mind* by Daniel H. Pink
 - *Customer Message Management* by Tim Reisterer and Diane Emo
 - *Light Their Fire: Using Internal Marketing to Ignite Employee Performance and Wow Your Customer* by Sara Roberts, Susan Drake, and Michelle Janette Gulman
- **White Papers / Articles**
- **3rd Party Suppliers**
 - Brand agencies and consultants
 - Software and hardware



Leverage External Resources

www.gbconnect.com/brandimage

- Articles
- Webinars
- Case Studies
- Research
- White Papers
- AMA Radio Show
(American Marketing Association)

GBC
Brand Image Solutions®

Why GBC?
Presentation solutions
Binder solutions
Media and Container solutions
Specialty services

Logoliosis is a condition that continuously weakens the health of your brand image...

Brand Wellness™
For the life of your brand.

Brand Wellness through:

- Partnership**
We provide customized solutions for all your projects, which streamlines expenses, saves you time and makes your job easier.
- More Choices**
A complete range of options and solutions lets us give your work a unique and more professional appearance.
- Brand Value**
We can create solutions that elevate your company's brand by presenting it consistently to all your audiences.

Click here to view our AMA hosted web cast, "About Face"

Resources
Click here for access to white papers, surveys, brochures, and other Brand Wellness™ related information.



Habit #7: Manage Your Brand

- How you view your brand
 - Key messages
 - Mission / Vision Statement
 - Unique Services
 - Brand Image
 - Your People
- How the world views your brand
- Control, maintain, protect
- Convey a unified message
- Deliver on the promise of your brand



Increase Proposal Acceptance While Increasing ROI

- Leverage resources
- Set budgets
- Know your prospect
- Maximize brand exposure
- Reduce back end development time
- Reduce costs
- Streamline processes



Case Study: Environmental Science Associates

- ESA is a multidisciplinary environmental consulting firm based on the west coast
- In business 37 years with offices nationwide in diverse practice group areas
- The firm's core services are:
 - Project planning and feasibility
 - Federal and state environmental compliance
 - Regulatory permitting and compliance monitoring
 - Technical and scientific studies
 - Natural resource management
 - Public outreach and facilitation
- Lisa Crossett: Vice President and Corporate Communications Director





Case Study



Challenge:

- Rebrand company to fit 7 practice groups, 10 offices, 5 regions and a newly acquired company under one versatile brand
- Control consistency of brand
- Control costs and development time

Part of the Solution:

- Environmental Science Associates becomes ESA



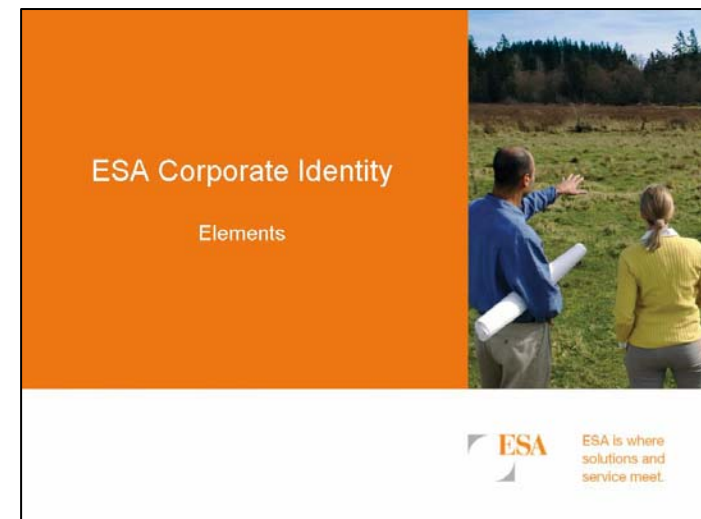
Case Study



Leverage Internal Resources

- Internal branding guidelines and publication standards
- Open communication between departments
- Templates available to all via their desktops
- Head designer controls logo

Corporate Identity Guide





Case Study



Leverage External Resources

- Bring new ideas to the table
- Support consistency for proposal materials: covers, binding, folders, CD holders and CDs
- Time and cost saving services
 - performed production set-up on all proposal materials
 - warehouse inventory
 - provides website ordering system
 - provide ongoing reporting tools: Reporting Now






Case Study


Leverage External Resources





ESA custom catalog

 Express. Impress. Success.™ Cart 

Home Search About Us What's New Technical Support Contact Us Logout 

BINDING >> **LAMINATION >>** **BRAND IMAGE SOLUTIONS* >>** Catalog Search 

My Account My Profile FedEx Tracking  Custom Catalog >> 

Welcome Olga Wolpoff

Frequently Ordered Items

Our records show that you have not purchased any one single catalog item multiple times in the past six months.

Order History

Order Date	Order Number	Status	Shipped To Zip	PO Number
8-14-2007	103892	Shipped	94104	sf ap
5-31-2007	994079	Shipped	94104	verbal
5-11-2007	962393	Shipped	94104	ap
3-29-2007	893195	Shipped	94104	ap sf

Click on the Order Number to view the detail of the specific order and to reorder selected, specific line items on an order.



Case Study



Set Budgets

- Budget Goal: 5% of the bid proposal's worth
- Budget includes labor, expenses, travel, marketing etc.
- Leveraged resources assist in controlling and maintaining budget



Case Study



Know Your Prospects

- Cover all criteria
- Content rich
- Easy-to-read
- Customize to client mindset
- Know issues at hand
- Positive client feedback



Case Study



Maximize Brand Exposure

- Rebrand that fits
- Across the board exposure
- Consistency
- Positive feedback





Case Study



Reduce Time and Costs

- **Reduction in Back End Development Time:**
25% of customization time
- **Reduced Costs:** Estimates 20-25% saving in design and graphic production costs



Case Study

ESA

Profitable Acceptance Rates and ROI

- **Acceptance Rate:**
 - Goal: 50% competitive
 - Actual: 60-70% overall (this includes non-competitive)
- **ROI:**
 - For every \$1 dollar spent earn \$7
 - Quarterly analysis



About Our Brand

- **The GBC brand has served a broad range of document communication needs for businesses worldwide for 60 years.**
- **Solution leader in:**
 - Brand Image Solutions®
 - Binding Solutions
 - Lamination Solutions
 - Full Circle Service™
- **Active partner and sponsor of SMPS for past 5 years**



GBC is an ACCO Brands Business (NYSE: ABD)

- **World leader in select categories of branded office products**
- **Nearly \$2 billion annual revenues**
- **Leading brands include Day-Timer®, Swingline®, Kensington®, Quartet®, GBC®, Rexel®, NOBO®, and Wilson Jones®**





Thank You

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To obtain the final version of this presentation,
the ESA case study,
the Trends Paper,
the White Paper,
and the SMPS/GBC research go to:
www.gbconnect.com/brandimage