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Mastering the Art of Proposal Writing

5 Step Guide to Successful Proposal Writing

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Why Proposals Matter

- Win new business
- Build credibility with your audience
- Demonstrate value and expertise
 - A well-structured proposal gives you a competitive edge.
- Funding sources vary



Why Firms Fail?

- Lack of knowledge
- Time management
- Poor internal collaboration
- Unclear writing styles
- Insufficient internal review (QC)
- Do not implement lessons learned

Goal: Develop a repeatable framework for success



Step 1 – Understand Proposal Requirements

Early engagement is a great approach with the client pre-RFP, if applicable

Key Actions:

- Review all guidelines, requirements, and deadlines
- Identify evaluation criteria
- Clarify ambiguities (if allowed) with RFIs and/or Q&A guidelines
- Research the client or agency goals
- Create a compliance matrix



Step 1 – Understand Proposal Requirements

Proposal Creation Schedule – Shipley, APMP

- Do we have enough time?

Color Team Meetings

Team	Focus Area	Key Output
Blue	Strategy, outline, assignments	Annotated outline, compliance matrix
Pink	First draft content and messaging	Comments for rewriting and improvement
Red	Near-final draft, evaluator POV	Scoring feedback, rewrite recommendations
Gold	Executive review and final polish	Final approval for submission
Black Hat	Competitive landscape analysis	Positioning strategies, win themes
Green	Pricing alignment and competitiveness	Final pricing strategy and price-to-win data



Step 1 – Proposal Compliance vs. Responsiveness

Compliance: *“Did you follow the rules?”*

- Compliance means meeting every requirement stated in the RFP or solicitation—no more, no less

Traits of Compliance

- Follows instructions exactly (format, length, deadlines)
- Includes all required forms, resumes, certifications
- Matches section numbering and headings
- Addresses all “shall,” “must,” and “will” statements



Step 1 – Proposal Compliance vs. Responsiveness

Responsiveness: *“Did you address what they care about?”*

- Responsiveness means aligning your proposal with the client’s goals, pain points, and evaluation criteria

Traits of Responsiveness

- Answers the “so what?” behind each compliance item
- Tailors content to the client’s mission and context
- Shows benefits, not just features
- Tells a persuasive story from the evaluator’s point of view

Use **theme statements** and **benefit-driven messaging** to demonstrate responsiveness



Step 2 – Develop a Clear Structure

Common Sections:

- Executive Summary – What's the big idea?
- Introduction & Background – Who are you?
- Scope of Work (SOW) – What will you deliver?
- Qualifications – Why you?
- Budget & Pricing – What will it cost?
- Conclusion & Call to Action – What's Next?

Note: Structure supports strategy - make it easy



Step 2 - Content Planning – Why It Matters

“If you don’t plan your content, you’re planning to rewrite it later.”

Before writing begins, build a clear plan for each section of the proposal—this saves time, ensures alignment with the RFP, and improves quality.

A **content plan** (also called a **section plan** or **annotated outline**) outlines:

- What each section must cover
- Who will write it
- Which win themes and messages to include
- What proof points and visuals are needed
- What the evaluator is likely looking for



Step 2 - Content Planning

Example: Technical Approach

Element	Plan Details
Assigned Writer	Jane Smith, Technical SME
Customer Requirement	"Describe your approach to project scheduling and quality control"
Key Message	Our team uses a proven method that reduces delays by 20%
Win Theme	"On time. Every time." Proven performance and real-time issue tracking
Supporting Evidence	5 past projects with zero late deliverables
Visual/Graphic	Gantt chart with milestones and a QC workflow diagram



Step 3 – Craft Persuasive and Clear Content

Writing Tips:

- Use clear, concise language
- Highlight benefits and outcomes
- Support with data, stories, and proof
- Address the decision-maker's priorities

Think: How does this proposal solve their problem?



Step 3 - Features, Benefits and Discriminators

“Customers don’t buy features—they buy outcomes.”

Great proposals go beyond listing capabilities. They explain why it matters and why you’re the best choice.

Term	Description	Evaluator Question Answered
Feature	A fact or characteristic of your solution	<i>“What are you offering?”</i>
Benefit	The positive result the client receives from that feature	<i>“Why does that matter to me?”</i>
Discriminator	A feature or benefit that sets you apart from competitors	<i>“Why should I choose you?”</i>



Step 3 - Features, Benefits and Discriminators

Feature	Benefit	Discriminator
24/7 project monitoring dashboard	Reduces downtime and enables real-time decisions	Only vendor offering live dashboards with client access
Certified Six Sigma project leads	Ensures high quality and reduced rework	3x industry average in quality audit scores over 5 years
Dedicated client onboarding team	Speeds up project kickoff and increases satisfaction	Onboards in under 5 days, faster than any competitor



Step 4 – Review, Edit, and Refine

Proofreading & Editing

- Fix grammar, typos, and formatting issues
- Ensure consistent tone, voice, and terminology
- Replace passive voice with active, persuasive language

Compliance Check

- Cross-check every requirement using a compliance matrix
- Verify section order, page limits, font/format rules
- Double-check attachments, forms, and certifications

Bonus Tip: Version Control

- Use shared platforms and naming conventions to avoid overwriting and confusion
(e.g., “*ProposalName_RedTeam_v3*”)



Step 4 – Review, Edit, and Refine

Color Team Reviews

- Pink Team = First draft → messaging, structure
- Red Team = Near-final draft → evaluator's POV
- Gold Team = Executive polish + approvals

Review with a Scorecard

- Mimic evaluator scoring criteria
- Use “Yes/No” compliance checks and narrative feedback
- Focus on clarity, completeness, and impact

SME & Peer Reviews

- Have technical and non-technical reviewers
- Invite someone unfamiliar with the proposal to test clarity



Step 4 - Sample Score Card

Evaluation Criteria	Score (1-5)	Comments (from your team)
Compliance with RFP Instructions		All sections included? Correct format and attachments?
Clarity of Technical Approach		Does the approach make sense? Are methods explained clearly?
Responsiveness to Client Needs		Does it address pain points and decision criteria?
Demonstrated Experience		Are past projects relevant and well-described?
Quality of Writing and Presentation		Is the proposal free of errors? Easy to follow?
Overall Persuasiveness		Does the proposal make a compelling case to select us?



Step 4 - Sample Compliance Matrix

RFP Section / Requirement	Requirement Description	Compliant? (Yes/No)	Notes / Action Items
Section L.2.1 - Executive Summary	Provide a high-level overview of the proposal and key benefits		Ensure all benefits align with agency priorities
Section L.2.2 - Technical Approach	Describe how the work will be performed, including tools and methodologies		Include timeline and specific tools used
Section L.2.3 – Past Performance	Include 3 past projects with contact information and outcomes		Verify contact info and outcomes are current
Section L.2.4 – Staffing Plan	Detail team roles, responsibilities, and key personnel resumes		Add bios for all named staff
Section L.2.5 – Pricing Volume	Submit a separate volume with itemized costs and justification		Double-check itemized costs match narrative

Step 5 – Submit and Follow Up

Confirm Submission Requirements

- Format (PDF, portal, printed copies)
- Signature pages, cover letters, forms
- Page limits, font sizes, file naming conventions

Submit on Time (or Early)

- Avoid last-minute tech issues
- Keep digital confirmation receipts
- Assign a backup submitter

Checklist Before You Hit Send

- All required volumes and attachments included
- Compliance with every instruction
- Final QA/formatting pass complete
- File versions locked and archived

Tip: Use submission logs or checklists to ensure traceability—especially in federal or multi-agency bids



Step 5 – Submit and Follow Up

Send a Follow-Up Message

- Thank them for the opportunity
- Confirm receipt professionally
- Offer availability for clarification or orals

Seek a Post-Proposal Debrief (*Win or Lose*)

- Request evaluator feedback: strengths, weaknesses
- Ask how your proposal scored
- Keep it positive and professional

Use What You Learn

- Internal lessons learned
- Update templates, tools, and team processes
- Identify training or process gaps



Final Thoughts

1. Understand the Requirements
2. Structure Clearly
3. Write Persuasively
4. Edit Thoroughly
5. Follow up Professionally

Success = Preparation + Strategy + Precision



Let's Connect!



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