

How to Create Winning Proposal Themes

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A winning proposal is all about **standing out from the competition** by capturing the attention and the imagination of proposal evaluators. Compliant and compelling proposal themes can make the difference between winning and losing your next bid by providing evaluators with the reasons to pick your bid. In an increasingly competitive marketplace, proposal teams need to be more efficient and effective in their approach to theme development.

Are you ready to win more?

Executives, business developers, capture managers, and other proposal professionals naturally want to win more business. That is their job. However, many think that the harder (or longer) they work, the more business they will win. They constantly seek to strike a balance between pushing their teams to the limit (work more) in order to win more. The idea of increasing proposal development efficiency and effectiveness at the same time (winning more while working less) may seem counterintuitive. However, it is a basic proposal concept that dates back to the 1960s.

This article unlocks some of the mystery behind creating winning proposal themes as the basis for developing more efficient

All too often, the story is written by authors who are responsible for different chapters of the story. These authors have no clear idea of the setting (understanding the need), the plot (solution), the characters (key personnel), the ending (customer benefits), or the moral of the story (themes).

When the proposal manager puts all of the sections together for the first time, it is no wonder that the feedback is all too predictable: “solutions are not clearly articulated”, “claims are unsubstantiated,” and “compelling themes and discriminators are missing.”

Most proposal teams understand the value of developing

“Very few teams take the time to identify the features, benefits, and supporting proof in sufficient detail to win.”

and effective proposals (winning more *and* working less). It discusses how to stand out from the competition by exploring the following topics:

- **What is a Theme and Why is it Important** includes the definition of a theme and the positive impact of theme development in the proposal process.
- **Features and Benefits** takes a closer look at two of the primary components of winning proposal themes.
- **The Proof is in the Pudding** describes how to get the most out of your themes by providing differentiating proof for the features and benefits that truly set you apart from the competition.
- **A Method for the Madness** introduces a simple, proven methodology for developing winning proposal themes that are compliant and compelling, and that position your company to win.
- **Win More and Work Less** concludes with common theme development challenges, theme development tips, and suggested reading to help you win more and work less.

What is a Theme and Why is it Important?

When you think about it, proposal writing is really about telling a story. A story about how your solutions to problems are better than your competitors’ in ways that really matter to your customers.

themes as the basis for telling the story their customers want to hear. However, very few teams take the time to develop the features, benefits, and supporting proof in sufficient detail to achieve the happy (winning) ending they seek.

A Theme or a Dream?

Capture managers and sales executives are often quick to claim how well they know their prospective customers, how they are uniquely positioned to win new business, and how they have defined the themes the proposal team needs to write a winner. More often than not, these so called win themes are nothing more than vague, generalized statements that hardly distinguish their company from any other bidder.

The following win themes were posted on the war room wall of one of my customers pursuing a \$2 billion contract (code name: Dream Themes), and serve as a vivid example of what win themes are NOT.

Proposal Win Themes?

- Best value
- No risk
- We understand you better than anyone else
- CMMI Level 3 best practices
- Relevant past performances
- Superior technical solution



**I need
to win
more**

**I need
to work
less**

strike a balance between pushing your team(s) to
the limit (work more) in order to win more

The DreamThemes were literally dreamt up by the capture team during a lunch meeting. These win themes lack the detailed features, benefits, and proof required for a compliant and compelling proposal. Posting them on the proposal room wall brainwashed the team into thinking that they had a winning approach and were ready to write.

After taking over responsibility for the management of this proposal, our team quickly developed a more compliant and compelling set of themes. We were under extreme time pressure and had to limit the theme development process to a focused 2-day effort. Our team developed the customer-focused themes that were missing from the proposal. Despite our heroic efforts, however, we lacked sufficient capture planning information and were not sure our themes were compelling enough to win.

In stark contrast, another one of our customers (code name: MeanThemes) insisted on spending over two weeks developing a 15-page theme document after the RFP was released. The MeanThemes document included five high-level win themes, each with 4-6 volume-specific sub-themes. The theme document included scores of section- and requirement-level themes, with detailed features, benefits, and differentiating proof statements at each thematic level. The MeanThemes were shared across the entire proposal team. They provided high-level guidance to the writers, and served as basis for an Executive Summary that virtually wrote itself. We were all convinced that we had developed a very comprehensive set of proposal themes, and were confident we were on

the path to a winning proposal.

Author Note: Despite their early win theme challenges, DreamThemes (2-day theme rush job) won the \$2 billion dollar multiple-award Blanket Purchase Agreement and was the only new bidder selected from a group previously dominated by incumbents. Ironically, MeanThemes (comprehensive multi-week theme development effort) lost their \$40 million single award to a lower-risk technical solution with a significantly higher price. The winner was the incumbent.

What is the ironic moral of the story? Sometimes even the best proposals, those with the most compliant and compelling themes, cannot overcome some overriding factors like incumbency and price.

What is a Theme?

Proposal experts define a theme as a “central idea (feature and benefit) that is supported or proved.” Most of these experts agree that, other than price, themes and supporting proof-points are the most effective way to distinguish your proposal from the competition.

Themes are really the fundamental building blocks for telling a compliant, compelling, customer-focused story. They are not sales slogans. Most slogans are easy to remember catch phrases like the popular *Washington Post* slogan: “If you don’t get it...you don’t get it.” This slogan is easy to remember, but lacks any real subscriber features, related benefits, and supporting proof such as

“ Proposal experts define a theme as a “central idea (feature and benefit) that is supported or proved.” ”

readability, cost, readership, breadth and depth of content, customized subscriber packages, and so on.

What is a Win Theme?

The term “win theme” is commonly used throughout the proposal industry. The use (or misuse) of this term contributes to the general confusion about themes. Win themes are higher-level (Meta theme) features and benefits that transcend the entire proposal. Effective proposals usually have no more than one or two win themes that are focused on what customers care about the most—things like increased efficiency (faster), increased effectiveness (better), lower cost (cheaper), and lower risk (safer). Win themes are relatively easy to develop, but are hard to develop in ways that differentiate you from the competition. The more difficult challenge is to develop a hierarchy of proposal-, volume-, and requirement-level themes (with increasing levels of detail) to support each high-level win theme.

What is a Proposal Theme?

When capture and proposal managers refer to win themes, chances are they really mean proposal themes. Most win themes are really proposal themes that include feature and benefit statements with supporting proof points at the volume, section, subsection, and even paragraph levels. Proposal themes are much more specific than win themes. They usually appear as a highlighted first sentence (in a proposal volume or section) and serve

as a mini summary of the subsequent narrative. At a minimum, well-written proposals have themes at the beginning of every volume, major section, subsection, and graphic action caption.

Volume themes are proposal themes that typically focus on technical, management, past performance, cost, or other main proposal topic areas. *Section themes* are themes that focus on topics within each volume (for example, management approach, key personnel, quality, and risk in the management volume). *Requirement themes* are themes focused on the most detailed requirements found in the RFP statement of work, performance work statement, or other detailed specification sections.

Why are Themes Important?

Proposal themes answer the evaluator’s most important question: “Why should we select you?” Volume, section, and requirement themes support win themes by sending an explicit message to evaluators, a message repeated over and over in subtle and not so subtle ways throughout the proposal.

Well-written themes provide clear and convincing reasons for capturing the evaluators’ attention and imagination. When those evaluators finish reading their assigned sections, the alignment of solution features with customer benefits and supporting proof points should leave no room for doubt, confusion, or skepticism. The bottom line—your proposal will be easier to evaluate and will tell a compelling story if it clearly articulated themes that score the most points.



Features

- 638 Horsepower
- 0-60 mph in 3.6 Seconds
- Top Speed of 205 mph
- Award-winning design

Benefits

- Speed
- Sex Appeal
- Power
- Handling



Features and Benefits

The development of proposal features and benefits is a key part of solution development and the critical first step in developing proposal themes. Most proposal teams use established methods and templates including storyboards, module plans, work packages, or some other form of pre-draft deliverable to provide a process and structure for feature and benefit development.

However, despite providing proposal teams with what might appear to be clear feature and benefit definitions, directions, and examples, many writers and subject matter experts ignore these things completely or simply do not understand what is required. At best, features are listed as benefits (and vice versa), or worse, the features and benefits are so vague and generalized that they fail to achieve the desired result—to provide evaluators with compelling reasons to select your company.

Without clear, compelling features and benefits, what happens next is predictable. When time pressures force the team to start writing before themes are sufficiently developed, the entire proposal process begins to unravel. This results in a first draft that requires a complete rewrite. Understanding proposal themes—and the features and benefits that comprise them—is therefore a big step toward efficient and effective proposal development.

Features Highlight What is Important to You

Features are easier for proposal teams to identify because they are about their company's products or services. However, proposals can go on and on about such known features with little or no knowledge of the customer.

“Understanding features and benefits is a big first step toward efficient and effective theme development.”

One of the most vivid everyday example of a feature is the window sticker commonly displayed on a new car. Window stickers highlight the most important characteristics of the vehicle such as equipment (ABS brakes, air bags, traction control, OnStar); specifications (4 cylinders, 2-wheel drive); the EPA city/highway gas mileage; and the price.

A simple sticker saves consumers significant time and effort otherwise required to read the owner's manual or perform their own inspections/tests to determine how one car compares with others. Can you imagine having to drive the car on the highway and in the city while making detailed notes and calculations in order to calculate gas mileage?

Features

- 10 Airbags
- 4 Reinforced Impact Bars
- OnStar™ (Safe and Sound)
- 6 Adjustable Seat Belts

Benefits

- Safety
- Comfort
- Storage
- Security



The features you develop for your proposal serve the same basic function as the window sticker. Proposal features describing the characteristics of your solution include type of technology/tools, methodologies, processes, performance levels, key personnel, and a host of other management, technical, past performance, and cost characteristics.

Benefits Highlight What is Important to Your Customer

Whereas features are all about what is important to you (car window sticker), benefits are all about what is important to your customer.

Although features are important, most proposal teams forget that what customers really care about are benefits. Benefits are aspects or advantages of a feature that typically solve a customer problem in some way. For most proposals this means increased efficiency, reduced cost, reduced risk, higher performance levels (or some variant of these). The most effective benefits address specific evaluation criteria, customer problems, issues, and concerns in the RFP, or unwritten customer hot buttons that did not make it into the RFP.

Most car salespersons are generally good at sizing up customers as soon as they walk in the door, and at knowing which car features will best align with the customer's benefits to make the sale. A stereotypical example using a car dealership analogy best illustrates this point.

A well-dressed man drives into a Chevrolet showroom in a

10-year old Corvette. The salesperson spots him and immediately ponders a short-list of likely customer benefits (i.e., power, speed, design, sex appeal). In his mind, the salesperson starts linking features of the new Corvette models he has on the lot (horsepower, 0-60 mph statistics, vibrant colors, motor trend design award) to the benefits he thinks the customer wants. Sounds like a done deal, right?

But what if the salesperson knew that the man was a stay-at-home dad and was borrowing his friend's car to drive to the dealership? What if this stay-at-home dad wants safety, comfort, storage, and security? You can almost picture the salesperson's head begin to swirl as suddenly a new set of features (airbags, reinforced impact bars, OnStar, and adjustable seat belts) are required to address safety benefits that are quite different from the need for speed. The same stereotypical story could be told about a woman driving up to the dealership in a minivan looking for a new car. What if the woman was Danica Patrick, the famous NASCAR driver? Would the features of a new Chevy minivan be compelling to someone looking for horsepower, speed, and award-winning design?

Themes Link Benefits with Features to Communicate Solutions

Proposal professionals are not in the business of selling cars, but the underlying principals of features, benefits, and the relationship between these two is the same in our profession. The proposal theme provides the connection between what is impor-

tant to a customer (benefit) and what is important to you (feature). The proposal team's challenge is to devise an effective and efficient way to identify customer benefits (explicit and implicit), to link these benefits to quantifiable features, and to communicate compliant and compelling solutions to customers in a way that is easy to evaluate.

The Proof is in the Pudding

Great proposal themes highlight the important and relevant elements of your solution. They are found throughout proposals—most notably in theme statements, focus boxes, action captions, and feature/benefit tables.

Highlighting themes in high-profile locations is the most effective way to avoid a common mistake: burying important “golden nuggets” in proposal nooks and crannies where they are sure to be overlooked. Well-placed themes make it easier for the evaluator to find clear and compelling reasons to select your company, and they also eliminate the need to read the proposal from cover to cover (which most evaluators do not do anyway).

Use Proof to Substantiate Your Claims

Although theme placement is important, many proposal teams fail to develop compelling themes with sufficient proof points that support their claims in the first place. This typically happens for a number of reasons:

- Many writers do not know enough about their assigned topics and sections to develop proof points.
- The solutions have not evolved sufficiently to identify differentiators and proofs.

- The team relies too heavily on generic boilerplate previously used for other customer requirements and solutions (with no proof points).

The result is a proposal filled with marketing fluff and unsubstantiated claims. These are two of the most frequent deficiencies found in proposal reviews. They underscore the need for substantiating proof points that make thematic features and benefits credible.

To do their job, proposal evaluators need quantifiable proof points that support your claims and set you apart from the competition (discriminators). Such proof points can include empirical findings, past performance evaluations, customer surveys, testimonials, or industry ratings from independent advisory companies (like Gartner's Magic Quadrant analysis).

Proposal themes without sufficient proof points are risky, and can even jeopardize your ability to win. For example, overused catch phrases such as mission-critical, leading edge, and best-in-class become meaningless clichés and lose credibility with evaluators when not substantiated. Differentiators provide undeniable proof that demonstrates your understanding of the customer and your solutions to meet your customer's needs and wants.

Customer benefits and solution features alone are not sufficient to create winning proposal themes. Supporting proof points are essential: they provide evaluators with reasons to believe (and select) you.

Is the Proof Really in the Pudding?

When it comes to great proposal themes, it is important to remember that *the proof is in the pudding*. This well-known

“Supporting proof points are essential—
they provide evaluators with reasons to select you.”

THEME 1:

- **Our technical approach includes automated coding software.** Most evaluators will view this theme as nothing more than a glorified re-statement of a basic requirement. At best, it is a lazy attempt at highlighting a generic feature (automated coding software). The more important elements (benefit and differentiating proof) required to score evaluation points are missing.
- **SCORE: RED (unacceptable)**

THEME 2:

- **Our EZ-Code™ software reduces time and cost.** This theme includes a specific feature (the name of the trademarked software) and a link between the feature and the associated benefits (reduced time and cost). However, most evaluators would agree that the benefits of reduced time and cost were probably the basis for the automated software requirement in the first place. Unless the amount of time and/or cost savings is specified, repeating these benefits is barely worth the effort.
- **SCORE: YELLOW (marginal)**

and commonly used proverb is a great metaphor for proposal themes and differentiators. Most of us have heard this phrase so many times, we believe we know what it means. But take a closer look. The literal translation of *the proof is in the pudding* does not make sense. The proverb has evolved over time from the original Don Quixote quote: “the proof of the pudding is in the eating” which means that you will not know whether food has been cooked properly until you try it. In proposal terms, evaluators will not believe your themes unless you use sufficient, quantifiable, and verifiable proof points (differentiators and substantiating metrics) to comply, persuade, and convince.

The Evolution of a Theme

The most effective themes include three simple components—benefits, features, and proof points.

The theme examples shown below of a DoJ automated coding software requirement helps to illustrate the power of compliant and compelling theme statements. This example is also used later in the article to describe a three-step theme development methodology. The example follows a technical proposal theme’s evolutionary path, starting with a poorly written theme statement (Theme 1), and ending with a compelling and convincing theme statement (Theme 4). Theme 4 includes all the basic elements of a great theme—benefit, feature, and differentiating proof. Each evolutionary step includes a high-level analysis of the theme and the score (commonly used color scale) that the evaluators would likely assign.

Theme 4 summarizes the major benefits, features, and proof points of DoJ’s automated software coding requirement, but it

is only the beginning. It is up to each section’s author of to make sure their narrative section following each theme includes sufficient benefit, feature, and proof detail to support that theme.

Proof Points Provide Customers with Reasons to Believe

A theme without proof points is like a court case without sufficient evidence. The result? The case is thrown out of court by the judge before the trial. Proof points provide a quantifiable way to substantiate your claims and give prospective customers tangible reasons to believe you are different (and better) than the competition. The strongest proof points are unique discriminators that you have vetted with your customer in advance. Ideally, these selling points are true for you and not true for at least one of your competitors. Be careful! Many companies do not really know what their competitors offer or rely on old (or incomplete) information. When you claim to have a unique approach (that really is not), you run the risk of losing significant customer credibility. If you have any doubts about the uniqueness of your approach, vet your solutions with the customer, or at least conduct some industry research to substantiate your claims.

The capture plan and other pursuit deliverables are designed to document and communicate customer hot buttons, selling points, and competitive information that is important for theme development. This information is essential if you truly want to stand out from the competition. If you do not have such information it will be extremely difficult to develop proposal themes that differentiate in a way that persuades evaluators to pick you.

THEME 3:

- **The intuitive graphical user interface of our EZ-Code™ software reduces staff training time by 75 percent to meet your service level agreements.** This theme is a significant improvement over Theme 2 and includes all of the required elements (feature, benefit, and differentiating proof). The feature is more specific (graphical user interface) and the potential differentiating proof (reduced staff training time) links to the specific evaluation criteria for meeting the customer-specified service level agreements. The metric (75 percent) quantifies the benefit to some degree, but it does not constitute real proof since it is not clear whether training takes hours, days, weeks, or months.
- **SCORE: GREEN (acceptable)**

THEME 4:

- **Our EZ-Code™ software reduces staff training time from 4 hours to 1 hour with an intuitive graphical user interface implemented on 20 DoJ projects.** This theme puts all of the pieces together. The differentiator in Theme 3 (reduced staff training time by 75 percent) is refined and quantified in a more meaningful and practical way (75 percent is replaced with 4 hours to 1 hour). The proof (implemented on 20 DoJ projects) is a very compelling metric. Remember that the DoJ is the customer in the example. The benefit (reduced staff training) is re-positioned in front of the feature (intuitive graphical interface) to place more emphasis on what DoJ really cares about.
- **SCORE: BLUE (exceptional)**

A Method for the Madness

It seems ironic that a group of engineers from Hughes Aircraft (now Raytheon) formalized the concept of the proposal theme statement. These proposal pioneers were tired of a highly inefficient proposal development process, low win rates, and frustrated subject matter experts who were pressed into proposal writing duty. After some period of trial and error, they developed an appropriately named methodology, the Sequential Thematic Organization of Proposals (STOP) Methodology. When STOP was released as a formal company manual in 1965 and ushered in the standardized use of what is commonly referred to as storyboarding. The thesis statement, as defined in the STOP Methodology, provides some important historical context to a common challenge faced by proposal teams today:

“The Thesis Statement shows the reader at a glance the essential argument of the theme body...the reader is relieved of the common vexation: When will this passage end, and what point is the author driving at?”

The thesis statement, proposal outline, graphic concepts, and storyboard review sessions were the pillars of the STOP methodology. These four pillars helped solve some of the most perplexing challenges (and questions) faced by our proposal development forefathers:

- How could the individual contributions of dozens of authors be efficiently aligned?
- How could the proposal manager guard against unexpected surprises?
- How could each author be assured that he/she is not spinning his/her wheels?
- How could the strong points of the proposal be made glaringly clear to evaluators?

The thesis statement (we call it the theme statement today) summarized each topic's main strategic point and led the evaluator to mentally challenge the author to prove it. The idea worked. Proposal development time was dramatically reduced using the STOP approach. Subject matter experts were much more efficient. Win rates increased significantly. STOP was a success.

More than 40 years later, the theme statement and the other original storyboarding pillars have been repackaged and rebranded, but essentially remain the same. Modern-day storyboard equivalents such as the Proposal Development Worksheet (Shi-pley Associates), the Module Specification, Storymap, and Annotated Mock-Up (SM&A), the Content Plan (CapturePlanning), work packages, and other proposal planning documents are all descendants of the original STOP storyboard concept. These modern-day proposal development tools all have the four STOP pillars in one form or another, and all emphasize the importance of thinking about (and writing down) proposal themes *before* proposal writing begins. Failing to follow this simple STOP approach before you write causes teams to fall into a number of common proposal development traps, such as:

- Drafting proposal prose before themes are identified and vetted.
- Placing too much emphasis on the wrong features and benefits.
- Lacking a common vision and thematic threads throughout the proposal.
- Playing into the hands of your competition with a “me too” response.
- Writing throw-away proposal drafts that significantly waste writer and review time.

What can proposal teams do to avoid these common pitfalls? How can we stop the maddening situations caused by these development traps that ultimately result in inefficient and ineffective proposals?

The Recipe for Success

While there are a number of established ways to develop proposal themes and differentiators, the best recipes combine the same simple ingredients from similar sources (the RFP, the capture plan, and the collective intelligence of your capture and business development teams). These ingredients are:

- 2 ounces of proposal evaluation criteria
- 1 ounce of proposal instructions

“The recipe for theme development includes a few simple ingredients from the RFP and the capture plan.”

- 1 scoop of solutions (for each proposal volume)
- 2 dashes of customer hot buttons
- A pinch of competitive intelligence

Exact measurements may vary depending on the type and quality of the RFP.

Use a Method...Any Method

Although the proposal theme recipe sounds simple, most proposal themes end up being...well...half-baked. The problem is that many proposal teams fail to invest the appropriate time and resources needed to develop proposal solutions and themes. Many proposal teams bolt for the boilerplate and forget about themes altogether—hoping that they will miraculously emerge in the Executive Summary the night before the proposal is due. The result is something that looks like this:

Our Company Name (Acronym) is pleased to respond to this <long project name> (Acronym) for <long customer name> (Acronym). More about us...Blah, blah X,XXX employees and \$XX million in revenues in 2012. Aren't we great and specialblah blah blah.

Blah blah, blah blah, this is a mission critical project. Blah blah we are a best-in-class, blah blah. Our technical solutions are leading edge blah blah. We have assembled a best-of-breed "A-Team", blah, blah, blah.

Blah blah blah <your vague or generalized statement here>. Blah blah, blah blah, blah blah, no transition risk.

Our technical approach includes autocoding software blah blah blah.

There are scores of proposal development methodologies that include some form of theme development process. I recommend a simple three-step process that starts with the RFP and applies basic capture information including customer hot buttons and competitive intelligence. This theme development approach is designed for simplicity and is easily executed by business developers, proposal managers, and proposal writers. A more detailed 10-step win theme development approach designed for engineers is described by Michele Rochon in "Engineering a Win Theme: A Scalable Proposal Method for Technical Sales Environments", *The Journal of the Association of Proposal Management Professionals*, Spring/Summer 2010.

Example: A DoJ request for proposal and capture plan contains the following information:

- **Detailed Requirement (Section C):** "Shall provide an automated tool for software development."
- **Instructions (Section L):** "Shall describe the tool and how it saves time and reduces cost."
- **Evaluation Criteria (Section M):** "Ability to meet or exceed service level agreements." "The lowest risk scores the most points."
- **Customer Hot Buttons:** Proven software is key, especially on other DoJ projects. An easy to use intuitive graphical user interface is a must.
- **Competitive Intelligence:** The incumbent contractor failed miserably in training DoJ programmers to use the tool effectively and efficiently.

Step 1: Use a simple three-column table to identify major customer benefits (column 1) and your related solution features (column 2). Keep it simple by starting with 3-4 major customer benefits and 1-2 solution features for each benefit.

Step 2: Once the high-level features and benefits are developed, list the proof points (column 3) for each feature. Be creative and define as many proof points for each feature as you can using

Customer Benefits 	Solution Features 	Proof Points 
Saved Time and Reduced Cost	<ul style="list-style-type: none"> • Proven EZ-Code™ software 	<ul style="list-style-type: none"> • Successfully installed at DoJ ("Outstanding" Past Performance ratings)
Reduced Risk	<ul style="list-style-type: none"> • Reduced staff training time • Successfully implemented at DoJ 	<ul style="list-style-type: none"> • Reduced average training time from 4 hours to 1 hour • 20 relevant projects in last three years
Increased User Acceptance	<ul style="list-style-type: none"> • Intuitive GUI • Reduced staff training time 	<ul style="list-style-type: none"> • Rated #1 for Usability (<i>Information Week, 2012</i>)



“Many companies fail to standardize their theme development processes or lack sufficient resources to follow those processes efficiently and effectively.”

quantifiable metrics. A good starting point is a total of 4-6 proof points for each theme. Use the capture plan as the basis for integrating customer hot buttons and competitive information into the process to create powerful differentiators that truly discriminate.

Step 3: Use a proposal theme template that highlights the theme statement (feature and benefit) using color, bolding, italics, or a combination of these to make the theme statement stand out. Pair up the supporting proof points in a focus box with each theme statement, as shown in the example to the right.

We Reduce Training Time and Costs with Our Proven Autocoding Software

- EZ-Code™ software rated #1 for best value and usability (Information Week, 2012)
- 75% reduction on instaff training time (from 4 hours to 1 hour)
- intuitive graphical user interface implemented promotes user acceptance
- Successfully implemented in 20 DoJ projects in the last 3 years
- Rated “Outstanding” by DoJ by all three past performance references

Our EZ-Code™ auto-coding software reduces staff training time from 4 hours to 1 hour with an intuitive graphical user interface implemented on 20 DoJ projects.

Incorporate theme statements and focus boxes into the storyboard, module plan, content plan, or whatever pre-proposal planning deliverable you use. Develop a complete and sufficiently detailed compliant outline with proposal themes for each major section. Sketch out graphics concepts to illustrate the major features, benefits, and proof points that are consistent with your theme statements, using graphic action captions to re-iterate the themes. Review the themes, outline, graphics, and action captions with your management team for validation, enhancement, and approval. Then, and only then, are you ready to start writing.

Win More and Work Less?

This article began with the definition of proposal themes and a description of the benefits of proposal theme development. We looked at the primary components of winning proposal themes (features, benefits, and proof). We described how to get the most

out of proposal themes by providing discriminating proof points to set you apart from the competition. We tied all the concepts together in a recipe for success—a proven methodology for developing winning proposal themes.

It all sounds pretty simple, right? Then why do many organizations continue to fail to apply these concepts consistently?

Theme Development Challenges

Most companies have established proposal processes that include some form of proposal theme development. However, many companies fail to either standardize these processes or lack the sufficient resources to follow them efficiently and effectively.

Unless the capture or proposal manager tackles the theme development task alone (not recommended), some type of working sessions are required to:

- Identify the requisite feature, benefit, and proof point input.
- Develop standardized theme statements and supporting focus boxes from this input.
- Review, refine, enhance, and finalize theme statements and focus boxes.

However, getting the right people in the same room to discuss proposal themes, features, benefits, proof, and differentiators requires significant planning and meticulous execution. Without the appropriate focus, a common understanding of terms, and the right meeting facilitator, theme development working sessions can be a monumental flop.

Tips for Working Less and Winning More

Winning proposals start with compelling and compliant proposal themes that can make the difference between winning and losing your next bid. Here are a few concluding tips to help you work less on your next winning proposal.

- Insist on some level of up-front planning to develop compliant and compelling proposal themes
- Use an established methodology and theme development process to identify customer benefits, related solution features, and differentiating proof points
- Review the resulting theme statements and focus boxes with your management team before you begin writing the proposal
- Seek external consulting support if you need help.

What are your thoughts and tips on creating great proposal themes? Do you disagree with any of my suggestions? What recommendations resonate with you the most? We can continue the dialogue one-on-one, on a LinkedIn discussion, or at the next APMP event. Contact Chris at chris@rainmakerz.biz or 202-255-2355.

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