

Persuasive Business Proposals: *Writing to Win More Customers, Clients, and Contracts*

Second Edition

New York: AMACOM, 2004

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Chapter 4

The Structure of Persuasion

Part of the problem people have in writing proposals comes from the fact that they write informatively instead of persuasively. What's the difference? And what's wrong with writing informatively in a proposal?

Contrary to what that VP of engineering thought, the one who believed persuasion was all about “fancy words and pretty pictures,” the real difference between information and persuasion is a matter of structure. And the reason is an informative structure doesn't work in a proposal is because information doesn't create momentum toward a decision.

Most people are comfortable providing information. That's a writing or speaking task you probably feel good about. Evaluations are a little tougher for most of us, and if they involve touchy material, as a performance appraisal might, we may actually dread doing them. However, for the majority of people, persuasive writing is by far the most difficult communication task. It involves a step-level increase in complexity and difficulty over what the other types of communication require.

Unfortunately, when we're under pressure we are likely to do what we're confident and comfortable doing. If we're short of time or feel uncertain about our readiness to proceed, we're likely to revert to the type of writing we find easiest. For most writers, that's presenting information, usually to an audience that's about as knowledgeable on the subject as we are. For proposals, that's a lethal combination. Factual information presented at a high level of technical expertise not only doesn't persuade, it may actually alienate the reader.

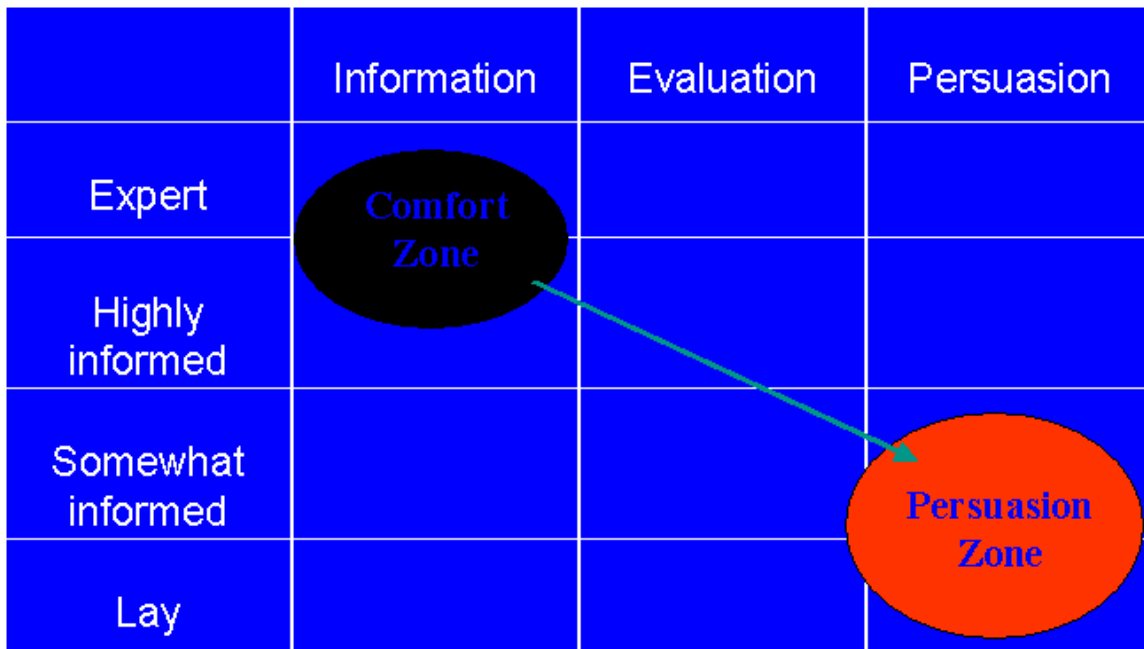


Figure 4-1: Move out of the Comfort Zone to Persuade Effectively

The purposes of these two kinds of writing are so different that using one mode when your purpose calls for the other will condemn your efforts to failure. So let's distinguish among the primary reasons people write in a business setting and look at how those different purposes require different approaches.

Information

When people present facts that other people need to do their jobs, they're writing to inform. The goal of informative writing is to be concise and accurate. The focus should be on transferring the information quickly and easily. The communication fails if the reader doesn't understand the facts or, worse yet, misunderstands them.

The best way to communicate informatively is to use the pattern taught in journalism classes: the funnel. (See Figure 4-2.) Start with the fact or set of facts that is most important to the reader. In journalism, that's often *who, what, when, where, why, and how?* Then go to the next most important fact. Then the third level of importance. The fourth, the fifth, and so on, until there is nothing left to say. By structuring your document this way, you allow your readers to stop reading as soon as they have seen enough.

The challenge in writing informatively is to figure out which fact is most important to the reader. The most common mistakes are writing chronologically, which usually leads to wordiness, or starting with facts that matter to the writer but not to the reader, which usually leads to confusion or false emphasis.

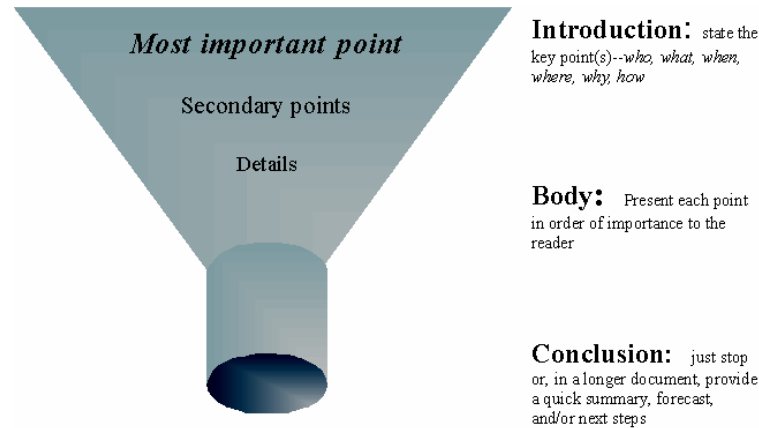


Figure 4-2: The Funnel-Shaped Structure of Informative Writing

Now wait a minute, you might be thinking. In the previous chapter we talked about decision heuristics and putting the kind of stuff up front that matters the most to the decision maker. Isn't that the same as the informative pattern? It's similar, and none of the structural patterns we'll be looking at can afford to start with content that the reader doesn't care about. But remember that the goal of persuasion is to motivate the decision maker to take action. Simply listing facts in a descending order of priority doesn't create any momentum toward action.

Evaluation

Sometimes people aren't trying to communicate facts alone. Instead, they're trying to interpret what those facts mean. They're offering an opinion about the significance of a certain group of facts, what those facts imply. This is particularly true when the facts are being offered in comparison to another set of related facts.

For example, consider what happens in a court case when one side calls in an expert witness. Such a witness isn't asked to establish facts about the case—"Where was the defendant on the night of July 15?" Instead, the expert witness is asked to offer an

opinion about what a certain body of facts indicates. “On the basis of these facts, do you think the defendant is mentally competent?” “Given this sequence of events, did the defendant act in accord with the profession’s current standard of conduct?”

In the business world, each time you write a performance appraisal or do a competitive analysis, you’re writing an evaluation. If you merely recite the facts but don’t offer your opinion, you aren’t doing the whole job.

The pattern for evaluative writing is depicted in Figure 4-3, below, where an evaluation is compared to a hamburger. The point of the illustration is that you need a top bun (the introduction), a bottom bun (the conclusion), and lots of meat in the middle. Informative writing doesn’t need a conclusion and it really doesn’t require any setting of the stage or introductory content.

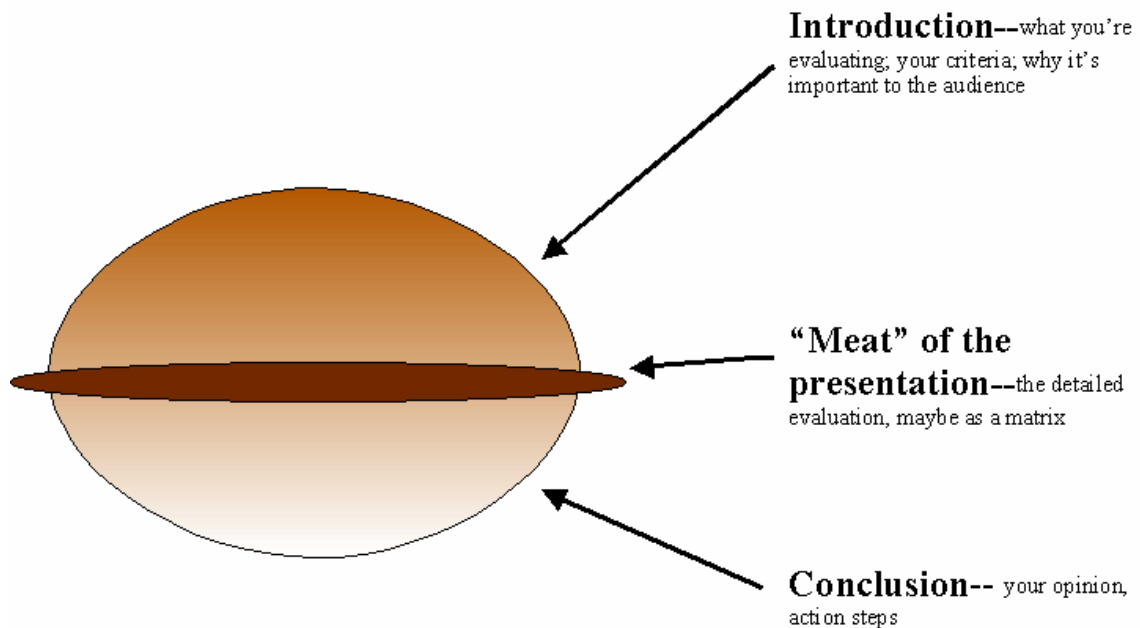


Figure 4-3: The Three-Part Structure of Evaluation

Good examples of evaluative writing can be found in *Consumer Reports*. If you were thinking about buying a DVD player or a refrigerator or snow tires, you could find articles there that would evaluate the various models available. First, they define what

they are discussing, why you as a reader might care about this kind of product, and what criteria are being used to evaluate the options. Next, they evaluate every model or brand point by point according to the criteria they listed. Usually this part is a combination of text containing anecdotal information about their testing and a table or matrix in which every brand or model is presented. Finally, they conclude the article by indicating which model is the “best buy” in their opinion. Do they care if you buy a DVD player or an ice maker or snow tires? No. It doesn’t matter to them if you never buy anything. Their sole purpose is to take a look at what’s available and offer an expert opinion about the various choices.

Persuasion

With persuasion, we care very much about whether the reader is motivated to buy. Persuasion combines elements of information and evaluation. It should present facts accurately, and it should offer intelligent, informed opinions. But to be successful as persuasion, what we write or say should influence what the audience thinks, how they feel, or what they do.

Fortunately, the most effective pattern for persuasion, which I call the persuasive paradigm, is simple to understand and use. It consists of four steps.

First: The customer’s needs. The initial step in persuading is to demonstrate you understand the customer’s needs, issues, or problem. Your first job is to summarize the business situation briefly, focusing on the gap to be closed or the competency to be acquired.

The vice president of sales for a large HVAC firm once asked me, “Why should I tell the customer what their problem is? They already know that. If they didn’t think they had a problem, they wouldn’t have called us.”

The answer, of course, is that we are not telling the customers something they don’t already know. We’re reducing their anxiety. They’re worried that the solution we propose won’t work because it’s the right solution to the wrong problem. By showing the customer that we “get” it, that we listened to them and understood what they told us, we

raise their level of confidence. We help them feel confident that what we propose will be appropriate for them.

Second: Outcomes. Next, focus on the outcomes or results the customer wants to achieve. How will he or she measure success? What must the organization see in terms of results to make their investment in your products and services worthwhile?

This part of the persuasive paradigm is probably a bit counterintuitive. After all, wouldn't it be more logical to state the problem and then give the solution? The thing to remember is that our goal is motivation. If we don't create a sense of urgency in the decision maker to go forward with our recommendation, we have not been successful in our persuasion effort. However, motivation does not come from problems and needs. Most businesses are faced with dozens and dozens of problems or needs, most of which will never get solved. Why? Because in the mind of the decision maker, "it's just not worth it." In other words, the return to be gained from fixing the problem doesn't outweigh its cost.

You don't want your solution to fall into the category of "not worth it." You create a sense of motivation in your customer by showing that the problem you are addressing is one that really should be fixed. The potential outcomes, the return on investment or improvement in productivity or whatever, is so big that they can't afford to wait.

Focus on their pain to get their attention; focus on their gain to get their commitment.

Third: recommend a solution. Most proposals don't recommend anything. They lapse into informative writing and merely describe products or services in a flat, factual way. To be a solution, the products and services you are recommending must be linked to the customer's specific problem. "One of the problems you are facing is declining transaction value in your eCommerce transactions. The aspect of our recommendation that will help increase transaction value is..."

Also, when you recommend a solution, sound like you believe in it. Say the words: "*We recommend* the immediate installation of LeadPoint asset management software." "*We urge you...*" "*We are confident...*" Don't be wishy-washy. Don't depend on telepathy to get your point across.

Fourth: prove you can do it. The last step in persuasion is to provide the evidence necessary to prove you can do the job on time and on budget. Typical kinds of evidence that you might put in a proposal include references, testimonials, case studies, resumes of team members, project plans, guarantees, third-party validation such as awards, details about your management philosophy, your company history, and so on.

Note that I am not saying your proposal should contain every one of these types of substantiation. Include only what the decision maker needs to see to feel confident about choosing you. That will be determined largely by the criteria that matter to this decision maker and by the specific requirements of the RFP, if there is one. Also, in a situation where you're responding to an RFP, your actual answers will be part of the evidence you provide—basically, evidence of your ability to comply with the customer's requirements and meet their objectives.

The four steps to persuasion can be summarized by the mnemonic device, NOSE, as depicted in Figure 4-4.



- **Needs:** Demonstrate an understanding of the customer's key business needs or issues
- **Outcomes:** Identify meaningful outcomes or results from meeting those needs
- **Solution:** Recommend a specific solution
- **Evidence:** Build credibility by providing substantiating details

Figure 4-4. The Persuasive Paradigm: the NOSE pattern

Lots of really bad proposals begin with a history of the vendor or with a technical description of the solution. These proposals don't work because they don't address the most important factor that will motivate the reader to decide to buy: a specific problem or need, the resolution of which offers a big payoff for the customer.

Let's take a look at what happens when we use the right structure to create a persuasive message. Normally I prefer not to teach from bad examples, but sometimes it's instructive to look at how somebody has mishandled a project in order to learn from his or her mistakes. In that spirit, I present here a couple of "proposals." The first is a memo written to an internal audience; the second is a letter proposal.

Sample Proposal 1

To: Bill Henderson
From: Woolie Crofft
Subject: Data Base Software

Today Mike Hinger stopper to explain the software available from his company which could give our executives personal access to the corporate data base in a way that would provide information to facilitate the decision-making process.

There are all kinds of things wrong with this memo, so many that it's difficult to begin to enumerate them. There's the vague subject line, the typo that transforms the verb into something that sounds like a Swedish surname ("Hinger-stopper"), the incredible sentence length, the use of nonspecific language ("personal access," "decision-making process"), and the fact that its chief organizing principle seems to be a loosely chronological stream of consciousness. But the most glaring problem, I think, is that it has no clear purpose. If you were Woolie's manager, Bill Henderson, your reaction to this memo would probably be a hearty "So what?" This memo sounds like one of those

worthless scraps headed “FYI,” most of which end up being deleted from our e-mail inbox or tossed into the garbage. It certainly doesn’t look or sound persuasive. It’s not addressing a problem. It doesn’t clearly recommend a solution.

Sadly, the author of this memo (yes, it’s an example drawn from real life, as all of the samples in this book are; only the names have been changed to protect the guilty) told me how frustrated he was that “nothing had happened.” “Management complains about these problems we have with the database,” he said, “but then, you when you make a recommendation on how to fix it, they just ignore you.” He honestly did not perceive that his memo hadn’t recommended anything, that it failed to propose a solution. He was surprised when I suggested that it could be clearer and more persuasive.

Sample Proposal 2

August 3, 2002

Mr. Larry Barns
Director, Telecommunications Services
Information Systems Center
Challenger Automotive
P.O. Box 1476
Moreno Valley, California

Dear Larry:

It was a pleasure having dinner with you last week, and I appreciate the opportunity you gave me to present my telemarketing application.

Challenger Automotive is perceived as a leading component supplier to original equipment manufacturers of on/off highway heavy equipment, heavy duty trucks, and passenger cars and light trucks. The majority of your products are marketed to original equipment manufacturers. For this reason, Challenger product identity is usually lost to the vehicle purchaser.

Advertising is aimed at equipment buyers so that when equipment purchases are made, Challenger components are specified.

In the text of its advertisement, Challenger encourages the consumer to write in for further information concerning the product. In some instances, a catalog which is published periodically listing the name, telephone number, and address of dealers and distributors who stock Challenger components is mailed to the consumer.

The risk inherent in this method of advertising involves consumers contacting distributors who no longer carry Challenger components or who are simply out of stock. On the low end of the risk scale, the distributor will refer the buyer to another distributor. This lengthens the buying cycle. On the high end, the distributor will sell the buyer a similar component supplied by a manufacturer other than Challenger.

The solution to this problem is telemarketing, specifically a product we refer to as "Dealer On-Line." Here is a brief description of how it works: The advertisement for the component will carry an 800 number. The consumer will call in on this number and reach a Challenger representative for the After-Market Sales Group. Using an electronic data base, the representative can direct the consumer to the nearest distributor of Challenger components.

Considering your initial response to my presentation of this concept, I know we have a solid application with "Dealer On-Line," and I am looking forward to presenting it to the Sales and Marketing group at the division with your support.

Sincerely,

André LeToille

This letter is truly awful. It starts with a hackneyed, cliché opening that is both inappropriate and weak. It's inappropriate because it implies that the salesperson was allowed to deliver his ideas only because he bought the client dinner. And it's weak because the tone is not one of partnership, but rather of subservience: "Thank you for letting me present..."

Then the letter wastes the client's time telling him what kind of business he's in. That's helpful. Is the client supposed to deduce from this information that the salesperson has done his homework and understands the client thoroughly?

It's not until the fourth paragraph that there is anything substantive—a hint of a business problem, namely that the advertising is probably not as effective as it could be. But the solution sounds so canned that the reader begins to suspect that perhaps the salesperson was somebody with a product in search of a need.

Finally, the ending is even weaker than the beginning. The writer completely abdicates responsibility for the selling process and doesn't really ask for anything. Certainly not for a sale.

Both of these sample proposals suffer from the same fundamental weakness. They're not organized in a way that clearly, effectively, *persuasively* communicates to the audience. In other words, they're not broadcasting their message in a way that it will penetrate the noise and clutter surrounding their customer.

So what happens if we restructure them using the persuasive paradigm? If we revisit the bad examples we looked at earlier in this chapter and apply the persuasive paradigm to them, we see some dramatic changes:

Revised Sample 1

To: Bill Henderson
From: Woolie Crofft
Subject: Improving Executive Access to the Database

Our executives need access to the corporate database. The information it contains will be invaluable in helping them develop strategies, make decisions, and respond quickly to changing market conditions. Unfortunately, they are currently blocked from obtaining that information by a number of system-related problems.

Software available from Hinger Associates will remedy the situation. It interfaces easily with our existing system, creating a user-friendly “shell” that allows even nontechnical people to select, format, and manipulate the data he or she needs without affecting the database itself. I recommend we lease this software system for a six-month trial with an option to buy.

Mike Hinger, the developer of the system, indicated that installation will take about four days. He will provide all the necessary documentation and support. A six-month lease runs \$2,500 a month, with the full amount credited toward the purchase price of \$30,000. If this software offers even a modest increase in executive productivity—saving each member of the executive team just two hours a month, for example—it will pay for itself well before the trial period is completed.

Shall we proceed?

You can see the difference immediately in this first revision. Notice how it gets right to the point: executives need access to make good decisions. Anyone who looks at this memo will see immediately why it’s important and what kind of problem it’s trying to solve.

Also, the solution is now clearly stated in the form of a recommendation: “I recommend we lease this software system...” No ambiguity there.

The final paragraph adds an extra fillip by providing a value proposition of sorts. It would be better if we had a bit more development in this area, perhaps, but at least the recipient’s thinking has been turned toward impact.

Here’s the other sample, revised using the persuasive paradigm:

Revised Sample 2

August 3, 2002

Mr. Larry Barns
Director, Telecommunications Services
Information Systems Center
Challenger Automotive
P.O. Box 1476
Moreno Valley, California

Dear Larry:

As you mentioned during our meeting on Tuesday, these are extremely competitive times for the automotive after-market parts industry. In such an environment, Challenger Automotive cannot afford to advertise in ways that benefit your competitors.

Unfortunately, that may be what's happening each time Challenger runs an ad aimed at the consumer segment of the parts market without also including a toll-free number that can connect consumers immediately with the nearest Challenger dealer.

Your current advertisement encourages consumers to write in for information about the product and for a catalog that lists the names, telephone numbers, and addresses of dealers who stock Challenger components. You also offer an option in the ad in the form of your Web site URL, although there is no obvious link from the home page to help a consumer find the nearest dealer.

Consumers want convenience. They don't want to wait. Most of your target customers are still reluctant to use the Internet to find information, and are not likely to go more than three clicks deep to find what they want. Even for those consumers who are willing to wait to receive a catalog or who have the persistence to use the Web site, there's no guarantee the information they get will be current. The nearest dealer might be out of stock or may no longer carry Challenger components. The net result? You have spent advertising dollars that ended up benefiting a competitor.

I recommend the installation of a toll-free number: 1-888-CHALLENGER. This number will automatically connect a potential customer to a Challenger representative in your After-Market Sales Group. Through an interface between the telephone switch and the representative's computer, he or she will see where the caller is located and will be able to identify the nearest distributor of Challenger components with parts in stock.

Challenger's advertising campaign is a winner. With the addition of a customer-focused tool like the CHALLENGER toll-free number, it can yield breakthrough results. Attached are brief descriptions of the results a similar system delivered for other companies and a pricing summary. We can install the system and have it fully functional within six weeks of your go-ahead. And sales can begin to soar immediately!

Sincerely,

André LeToille

Once again, I think the improvement is so dramatic that it hardly needs to be pointed out. The first paragraph immediately states a problem in clear terms, and from there develops a case for the recommendation. There's not much evidence or substantiation offered here, but it may not be necessary for a recommendation like this. After all, using a toll free number isn't exactly a risky business proposition.

Going Deeper into Persuasion

For thousands of years, people have tried to figure out the best way to persuade other people to do things. We know that persuasion has been the subject of serious study since the days of classical Greece. Plato worried about the rhapsodes' ability to appeal to citizens' emotions and persuade them to do things that were not in the best of interest of the city or themselves. Aristotle wrote one of the great treatises on persuasion, and among the Romans the ability to persuade was considered a hallmark of responsible citizenship.

Since World War II, researchers have worked particularly hard to identify the elements of persuasion. Why? They have some practical motives: improving advertising and marketing campaigns, motivating audiences, influencing the electorate, girding consumers and voters against propaganda, understanding the dynamics of brainwashing, and—yes—writing better proposals.

From all this speculation and research, four elements have consistently been a vital part of nearly every theory of persuasion. These elements apply to technical proposals, sales presentations, motivational speeches, policy statements, marriage offers, and just about every other form of persuasion encountered in modern life. Giving them some consideration will give us a deeper understanding of the process of persuasion.

The four elements most frequently examined as essential components of effective persuasion are the *message*, the *receiver*, the *channel*, and the *source*.

Message

The impact of your *message* depends in part on whether the receiver is receptive to it to begin with. If the evidence or logic in a particular persuasive message is in line with the audience's basic values, beliefs, or biases, the receiver is more likely to accept it and modify his or her attitudes accordingly. If the evidence runs counter to the receiver's basic beliefs, persuasion is far less likely to occur. Thus, the way you frame your message with regard to your audience preferences is critical.

That may seem circular: You can persuade people to accept only the things they already accept or to do the things they already want to do. But that's not quite what's going on here. There is a difference between a *belief* and an *attitude*. Someone may issue an RFP for new equipment because he or she believes that production efficiency can be improved by using more modern technology. If you can base your proposal on the same belief and then demonstrate how your equipment will introduce labor-saving enhancements, the receiver's attitude toward *you* as the most suitable vendor will change in a positive way. However, if you send out a canned proposal, one that emphasizes the ruggedness and durability of your machines, instead of their impact on production

efficiency, you will be not be addressing the client’s basic belief. As a result, you may not persuade him or her to choose you.

This is the fundamental problem in submitting boilerplate proposals. Because customers vary widely in their beliefs and values, using the same text for everybody guarantees that a large percentage of them will find your message irrelevant or unconvincing. We will examine how to develop a client-centered message in the next chapter.

Receiver

The *receiver* is a vital component of persuasion, because it’s the receiver who must take action, who must make a decision, or whose attitudes must change.

A message that persuades one person may leave another unmoved. Why? For now we can simply note that two of the factors determining how much influence a persuasive message has on an individual are the receiver’s personality and his or her personal involvement in the issue. A person who feels threatened by change will be much harder to influence than one who feels confident and secure. Similarly, a decision maker will be particularly cautious in taking action on an issue that will directly affect his or her career.

In addition, people process information in different ways. Presenting a highly detailed and analytical document to a person who prefers the “big picture” will complicate the persuasion process. Presenting information at a technical level that is too difficult for the audience to grasp will also damage the effort. After all, most people tend to say “No” when they are confused or uncertain about the information they’re receiving.

In chapter 6 we’ll talk about the best ways to adjust the delivery of your message to match the audience’s expectations, preferences, and capabilities.

Source

The *source* is the person or thing doing the persuading—the politician making a speech, the sales representative trying to close a sale, the company submitting a proposal, the foundation running a public service announcement.

To be effective, the source must be both *credible* and *appealing*. People believe in people they trust, and trust is based on a combination of credibility and appeal (“rapport” is another way of defining the quality I have in mind here).

The audience must like the person delivering the message. They must feel comfortable with the source. They must believe that the person cares about them and understand them. They must respect or admire the company submitting the proposal. These are all components of appeal. If you don’t establish a measure of rapport or appeal at the outset of your presentation or document, the audience may tune out and never look carefully at whether you are credible.

However, if there is an element of appeal, then listeners and readers will also look for evidence of credibility. The person doing the communicating must appear to know what he or she is talking about, must provide accurate information, must assemble relevant evidence, and must indicate that he or she understands the audience. These are all credibility factors.

If you think about advertising, you can see how companies choose representatives on the basis of these qualities. As a spokesperson for athletic shoes or sports drinks, Michael Jordan is both credible—he certainly knows something about sports—and appealing—he’s good looking, successful, and apparently a friendly guy. He probably wouldn’t be as effective in commercials for lawn fertilizer or dump trucks. He’d still be an appealing personality, but we’d have to question the credibility of his endorsement.

Which is more important ultimately, credibility or appeal? It depends on the audience, the mode of delivery, and the subject. In terms of audience, their sophistication will determine the extent to which they factor in issues of credibility. Children aren’t likely to evaluate credibility very well, for example. In an oral presentation, it’s important to work on appeal or rapport first, because if you don’t connect with the audience quickly, they won’t listen to you. Finally, if we are talking about something like beer or hand soap, advertisers are more likely to focus on using an appealing representative—i.e., young, fun-loving, popular, sexy, attractive, or famous—than a credible one, such as a brewer or a chemist.

In chapter 7 we'll discuss how you can establish credibility in your proposals.

Channel

The *channel* is the medium by which your message is delivered to the receiver. Traditionally, proposals have been delivered on paper in print, but there are now other options and they are becoming increasingly popular.

For example, your proposal might be accompanied by digital video of your equipment in action. Including a CD or videotape with your document expands the range of channels you are using to get your message home. Or you might present your proposal orally before handing over the document itself, using some form of multimedia presentation graphics. Combining an audiovisual channel with print is a good idea, because research indicates that for relatively simple messages an audiovisual presentation is actually more persuasive than print alone.

One of our clients goes a step further to add creativity and humor to their proposal submissions. An organization focused on managing conferences, trade shows, and large corporate events, they often use the theme of the show or the sponsoring organization as a cue to modify their channel. For example, they packaged each copy of a proposal to manage the national meeting for a union in a traditional metal lunch box. Inside were a combination of materials, including a printed proposal, that showed how they would handle the event in an entertaining and professional way.

Remember that different receivers will respond differently to the same message presented in a particular medium. A decision maker who likes to study information in detail and who tends to be an introvert will prefer to base decisions on a written proposal. A more intuitive decision maker, by contrast, would probably glance through the details in a written proposal but rely heavily on any accompanying presentation and the overview elements.

The growth of the internet and the widespread use of e-mail has spawned a trend for electronic submissions. Vendors are invited to send in their proposals by posting them to a Web site, e-mailing them, or responding in forms posted on the Web. To the extent that companies are using this kind of technology to save time and money, it's helpful. But

when they post a spreadsheet or a rigid form, asking potential vendors to fill in the blanks, they are actually doing both themselves and the potential vendors a disservice. By reducing the buying process to spreadsheet comparisons, a company treats all products and services as commodities and limits the ability of providers to offer anything creative. Differentiators disappear and calculations of ROI or value become very difficult. All the same, you may still have an opportunity to use the principles we discuss in this book. For example, if you're allowed to submit a cover letter with your form, turn it into an executive summary. If you're allowed to provide a substantive answer, use the persuasive structural pattern for RFP responses (presented in chapter 12). It's not an ideal situation, but if you're forced to respond in a spreadsheet, don't abandon your commitment to communicating persuasively.

Another recent trend has been the emergence of sites that bring buyers and sellers together for business-to-business transactions. These sites allow the buyer to define the requirements and vendors then submit their proposals directly to the buyer through the site. Although some of the pioneers in this form of transaction brokering have failed, there's no question that the Internet is a channel that will influence proposal writing for decades to come.

Managing the channel is a critical issue, obviously. In fact, the balance of this book, from Section III onward, focuses on creating proposals that are effective channels for your message.