

36-Point Information Technology Proposal Writing Cheat Sheet

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Before you submit your next proposal, check yourself against the points below, and see how you feel about them. There are no right or wrong answers here. They must be right for you.

1. This proposal is merely the written summary of an already made conceptual agreement with a real buyer.
2. This proposal is not a desperate attempt to win a competitive bid in an RFP battle.
3. This proposal is to be submitted to a real buyer that exhibits all signs of a potential perfect client - Perfect buyer, perfect company and perfect project. Summarise your evidence at least in your head. This buyer has both the money and the authority to give the go ahead on the project.
4. The buyer is clear about the experienced problem/symptom. You don't ask buyers to diagnose the problem, but you want to know her experienced symptom. Explanation like "Our IT system is crap" is not good enough. Make sure you have something certain.
5. The buyer is clear about outcomes. If you don't know where the client is going, you can't help him to get there. Once the client tells you what he wants to achieve, then you can start planning together.
6. The buyer has quantified the desired future state of his business to you.
7. You are clear about the buying process. You must understand every step of the decision-making process and what exactly is expected of you at each step.
8. The buyer has accepted the outline of your proposal. Even before writing a proposal, you communicate to the buyer in what structure and order you plan to present your findings in the proposal. Make sure the buyer agrees with your proposed structure.
9. Both you and the buyer are clear on the specifics of the follow-up process.
10. You and the buyer have a verbal agreement on the main points of the project.
11. You and the buyer have a verbal agreement and the buyer has intent to engage you.
12. Your proposal is free of elements and concepts that you haven't discussed with the buyer yet.
13. Your proposal doesn't to build a relationship with the buyer.

14. Your proposal doesn't serve as a document for comparison.
15. Your proposal doesn't get bogged down touting your company and your people's credentials.
16. Your proposal doesn't try validating your proposed recommendations.
17. You've actually met the buyer.
18. Your proposal doesn't try to be a negotiating tool.
19. Your proposal is a "big picture" document.
20. Your proposal is written in business English not in techie English.
21. Your proposal is submitted to "boardroom people" (guardians of the bottom line) not to "server room" people (guardians of the T1 line).
22. Your proposal is void of "nuts and bolts" details.
23. Your proposal stipulates the desired outcomes of the project.
24. Your proposal describes how progress will be measured.
25. Your proposal clarifies accountabilities both for you and the buyer.
26. Your proposal sets the intended start and completion dates.
27. Your proposal offers 3-4 options at different service- and investment levels.
28. Your proposal reiterates the project's value.
29. Your proposal details the terms and conditions of payment, fees and reimbursements.
30. Your proposal becomes a template of implementation for the project
31. Your proposal establishes boundaries to protect against "scope creep".
32. Your proposal specifies the guarantee you offer for your work.
33. You submit your proposal both electronically and in hard copy format.
34. Making the mistake of citing your fees too soon.
35. Making the mistake of talking about tasks and activities.
36. Your proposal is no longer than 2.5-3 pages.

To learn more about how to match your proposals to the buying cycle, download [*More Brain Less Brawn: High-Leverage Client Acquisition Strategies For Privately Held IT Companies*](#), which you can access free of charge.

It's a 72-page overview of how you can keep your company fully booked with high quality clients that are eager to accept your terms and pay your fees and prices, because they know you're worth every penny of what you charge.