New Trends To Revitalize Tired Proposals

By Ann M. Leiner

As a society, the way we consume information has changed. We have become accustomed to small bites of information (think Twitter) and highly graphical content (think Instagram and infographics) that can be skimmed and quickly grasped. Blogs, social media posts, and other digital marketing best practices emphasize brief word counts and graphics as most effective for communicating messages.

If brevity is our new normal, why do many firm owners still ask for, and A/E/C professionals respond with, the same stale proposal formats we've used for decades? Owners recycle RFQ or RFP response requirements, specifying page counts and font size, with seemingly minor adjustments for the opportunity at hand. Proposals with 20 pages, 50 pages, or more are not fun to write or read. Just ask an owner faced with a stack of proposals, many of which look and read the same.

Thankfully, this stale approach is experiencing some disruption. We're seeing new approaches led by both A/E/C professionals and owners that employ techniques to create more effective communication between the two groups.

Trend #1: Less Is More

Professionals in some A/E/C firms replace boilerplate-laden proposals with highly customized presentations of only the content of greatest value to the reviewers, in small pieces. For instance, rather than including the standard one- or two-page résumé, they craft a bio with a paragraph or two that not only documents experience, but describes the team member's working style, accompanied

Simpson Gumpertz & Heger (SGH) offices, Boston, MA. Margulies Perruzzi Architects. ©Sabine Nordberg Architectural Photography, sabinenordberg.com.

by a friendly photo. This is more akin to what we'd see on LinkedIn.

We see this in interview settings as well, where one firm's graphic-heavy presentation with few words differs dramatically from the competition's "death by PowerPoint bullets" approach. Successful firms are finding creative ways to demonstrate understanding of their client's most important needs using fewer words and more visual content.

Trend #2: A Picture Is Worth 1,000 Words

O'Donnell & Naccarato, a structural engineering firm in Philadelphia, PA, made a tactical decision to use a graphic-heavy approach in their qualifications to attract architects as clients. They present information that appeals to an architect's fundamental visual nature, rather than using a wordy narrative about the value of their design or long lists of project experience.

Other design and construction firms embed video—a customized message specifically for proposal reviewers that may feature a client testimonial or something else of benefit. HNTB, a national infrastructure solutions firm, submitted a mixed-media proposal for a train alignment project. The first page of the hard-copy proposal was custom manufactured to integrate a paper-thin 2.5" x 5" video player loaded with a 3D animation of the project, narrated by the project manager.

A recent RFQ by Michigan State University for open-end design services encouraged respondents to include links to detailed résumés and added, "Feel free to provide links to presentations or papers your firm has developed that are appropriate." Some firms create a special website with curated content linked to a proposal. (Check every link, and make sure the reader can easily move from the link back to your proposal.)

Before you get too creative, you must also proceed with caution and follow directions. Some owners specifically disallow embedded links or video, while others (like the New York State Department of Transportation) prohibit graphics, only allowing text-based proposals.

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Our recent RFP for on-call construction management contracts asked firms to submit proposals on two A3s. Despite our initial uncertainty as to how this would be received, the proposing firms and our selection panel both loved the use of the A3s. Our selection committee members said the focused information on the A3s was much more desirable than poring through page after page after page of a regular tabbed proposal, much of which is not even read or used in the evaluation and selection. As a result, we were able to assess the firms and make our selections more quickly.

— Robert Unger, P.E., director of construction management, Pennsylvania State System of Higher Education

Trend #3: Digital Submissions

Increasingly, proposals are being submitted digitally, although some owners still require hard copies. Firms have started incorporating interactive components that make it easy to navigate a proposal's contents or elaborate on a component.

Conversely, other owners have moved to online form-based submissions, requiring firms to use their web browser to complete text boxes with limited word and character counts. This format is seen as streamlining information, as it doesn't allow incorporated graphics. We have seen other cases where the required factual information is provided through the online form, and the respondent has the option of uploading PDF files (usually of limited pages) for each section to augment the facts.

Trend #4: Adopting a Lean Approach

One significant disrupter is the Lean technique known as A3 Thinking. A3 Thinking has long been used in other industries as an effective decision-making and reporting tool. It's based on the concept of making information visible at a single glance, using the A3 format, essentially an 11" x 17" sheet of paper (See Figure 1.). Recently, institutional clients like Universal Health Services and Penn State University's Office of Physical Plant have required A3 submissions (often one to three pages) in lieu of a traditional proposal.

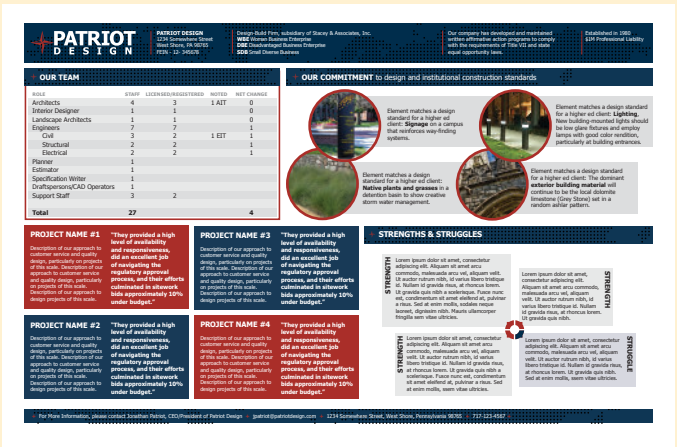
Figure 1. Examples of A3 Thinking. Courtesy of Stacey & Associates.

How Can a Whole Proposal Fit on 11" x 17" Paper?

The A/E/C industries already use A3s in a variety of ways—organizational charts, process flowcharts, project schedules—typically bound into proposals using an accordion fold. And there's also the effective interview placemat, used to highlight key messages and provide interviewers with the visual orientation of who's speaking.

But how does this work for an entire proposal? There are variations of the A3 submission process to reflect the presentation of qualifications for an RFQ versus project-specific details for an RFP submission. Solicitations may permit additional 8.5" x 11" pages for cover letters, full-page résumés, or supplemental information in greater detail. Owners often vary the requested (or prescribed) information in each submission as they filter through the selection phases, e.g., long list, short list, and interview.

Savvy firms are incorporating A3s into proposals that don't ask for A3s, using them for executive summaries or the presentation of complex data. Further, A3s can be a project management tool, providing a dashboard on a project's status (in lieu of voluminous job conference minutes) or as a decision-making tool to compare the cost-benefit of design options. These techniques allow firms to introduce owners to the benefits of A3s, paving the trail for future A3-only submissions.



Given the scarcity of real estate in the A3 format, an A/E/C firm must focus its thinking to provide only information of highest relevance to the reviewer, eliminating wasteful boilerplate and bringing a high-level of graphic sophistication to the presentation. Effective techniques for this proposal-response format include choosing every word carefully and including infographics, flowcharts, sidebars, illustrations, plans, and other graphical elements.

Disruption or Elevation?

Disruption works both ways. The ability to incorporate exciting new approaches, like A3 submissions and interactive media-rich proposals, makes life easier on the reviewers, while the basic online form submissions only serve to further commoditize A/E/C firms. Owners and A/E/C professionals should remember how we all absorb information and adopt the trends that facilitate it most effectively. New proposal trends may just disrupt and elevate the process for all involved. ■

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Resources

Download a hypothetical A3 submission: http://www.staceyandassociates.com/a3-works

Read the A3 Thinking FAQ: http://a3thinking.com/faq.html

Further Reading

Modig, Niklas and Ahlström, Par. (2012). *This is Lean: Resolving the Efficiency Paradox.* Rheologica Publishing.

Sobek II, Durward K. and Smalley, Art. (2008) *Understanding A3 Thinking: A Critical Component of Toyota's PDCA Management System.* Productivity Press.

Liker, Jeffrey K. (2004). *The Toyota Way: 14 Management Principles from the World's Greatest Manufacturer.* McGraw-Hill Education.

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