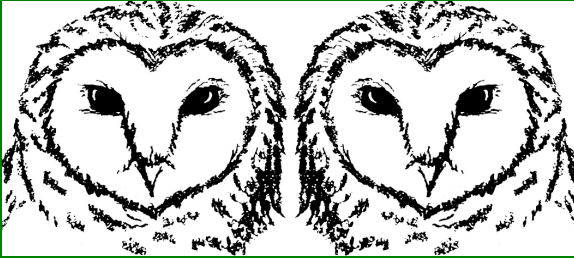


Position Paper

# INGREDIENTS FOR AN EFFECTIVE PROJECT PROPOSAL



**TechKnowPartners**

[www.techknowpartners.com](http://www.techknowpartners.com)

## **INGREDIENTS FOR AN EFFECTIVE PROJECT PROPOSAL**

*Successful consultants, executives, and salespeople know the essential ingredients for a project proposal that gets results. They include the ability to articulate a clear understanding of the problem, including needs and requirements, a solution that with features and benefits, and a persuasive approach with a call to action.*

The contents of an effective project proposal that gets results include:

*Understanding of the problem:*

- Situation - this is the "status"
- What complicates the situation in terms of strengths, weaknesses, opportunities, and threats - this is a further elaboration of the "status"
- Clear statement of the problem including needs and requirements - this is the "what"
- Solution hypothesis - "going in" position including potential features and benefits - this is the "why" - with an explanation as to the advantages over other alternatives

*Scope, objectives, and goals:*

The scope of the project is a general statement to address the problem and the solution hypothesis. The scope statement establishes boundaries - what the solution hypothesis is and what it is not. The project may be subdivided into phases, such as planning, analysis, design, construction, implementation, enhancements, and maintenance. Hence the scope may define the entire project and/or a phase within it.

The objectives are general statements of direction and the goals are specific results to be achieved by the project. In general, there should be no less than three and no more than seven objectives.

*Approach:*

The approach is a written narrative supported by a work plan that explains how the objectives and goals are to be accomplished.

The work plan consists of a breakdown of activities into phases, segments, and tasks, with supporting work day, schedule, and resource estimates.

The resource estimates include human, materials and supplies, facilities, and equipment. The work plan is supported by assumptions for availability of resources, quality assurance reviews, and signoffs. Activities can be loaded, schedules can be laid-out over time in milestones, and the critical path can be determined from the work plan.

The approach should be supported by facts, statistics, and metrics.

*Deliverables and expected results:*

The end-deliverable and results at intermediate milestones should be defined with clear statements of features, benefits, and standards for quality.

If the project is a phase of a larger program, one deliverable should be the plan for the next phase of work.

Expected results other than the deliverables should also be defined. Examples include the learning and experience gained by the project team, and the goodwill to the enterprise as a whole.

*Governance:*

The structure of the project, and the roles and responsibilities should be defined including the sponsors, the beneficiaries, the advocates, the project manager, the steering committee, and the organization of the team.

The approach to progress reporting, quality assurance reviews, audits, approvals, and signoffs should be defined.

*Costs:*

Based upon the approach, deliverables, and governance, the project costs should be presented, ideally with an allowance for contingency for unplanned activities and performance variances. Costs should be presented as estimates based upon the assumptions stated in the approach.

If costs are presented for downstream phases of work, they should be described as approximations subject to refinement based upon future work.

*Call for action:*

A description of next steps, schedule, and responsibilities in the context of the "status", the "what," and the "why." The benefits of the solution and the approach should be clearly explained, and why they address the strengths, weaknesses, opportunities, and threats identified in the problem statement. The proposal should end with a memorable statement about the benefits of the proposed solution and approach, and what the audience should do next. It is important to stress that time is of the essence to achieve the benefits.

*Notes:*

- If the audience is "bottom-line" oriented, recommendations should be presented first based upon conclusions based upon facts; if the audience is "analytically" oriented, findings should be presented first that lead to conclusions and recommendations.
- On large projects, it may be necessary to perform a certain amount of analysis and design work before a detailed cost/benefit analysis can be performed. Prior to the cost/benefit analysis, costs are approximated, and then estimated thereafter. The cost/benefit analysis is the basis of a "go/no go" decision for further work because implementation costs are usually a multiple of those for planning, analysis, and design.
- Once the proposal has been approved, the work breakdown structure should be decomposed into a work program (in days or hours) and budget (in monetary terms) that shows each activity loaded with the appropriate resources based upon skill levels over time.
- Intermediate deliverables should be produced on a regular basis to maintain project momentum and to ensure that the work is on track.

Effective proposal development is an enterpriship (entrepreneurship, leadership, and management) competency.

*Key success factor...*

It is important that the follow-on activities from the project definition be monitored with milestones and progress reporting. It is easy to lose control of such activities if they are not properly monitored, especially if new opportunities and threats subsequently arise.



# TechKnowPartners

Working with you today for your technology needs tomorrow

Technology Strategy and Infrastructure Professionals  
Consulting • Design • Installation • Support

TECHKNOWPARTNERS, LLC  
4659 SOUTH LAKESHORE DRIVE, SUITE K  
TEMPE, ARIZONA 85282USA  
[www.techknowpartners.com](http://www.techknowpartners.com)  
(480) 553-8951

© Copyright 2012  
All rights reserved