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ULTIMATE GUIDE TO
CREATING A WINNING
TENDER

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Guidelines for Writing and Winning AEC Proposals

If you work in the AEC industry, then you are, at least, familiar with RFPs and proposals. You know how important proposals are to the business development process, and how much time and effort goes into their creation.

This guide on how to create winning AEC proposals has everything you need to create high quality proposals that win projects and grow your business.

Proposal Writing Basics for AEC Professionals

Proposal writing is one of those subjects on which a lot has been written but very little has been said. Sure, there are dozens of proposal writing guides out there, but few of them are available outside of business school, and none of them equate proposal writing to the artform that it is.

This guide on proposal writing for AEC professionals aims to correct that oversight by acknowledging that proposal writing is an incredibly complex, analytical process with many facets that require full collaboration from the entire firm. Winning proposals also require:

- **Creativity** – Winning proposals do more than answer the RFP. They impress with their creativity and persuade with the ingenuitive way in which they present information to the client.

- **Writing Ability** – Writing a winning proposal calls for more than technically correct grammar. At its core, a winning proposal is a persuasive writing assignment, wherein you must not only showcase the merits of your firm, but also inspire the client to the desired action.

- **Design Skills** – Winning AEC proposals are built on quality design. Lacking a design element, your proposal will read as a bland series of black and white text. The best proposal writers are also thoughtful with their layout, and consider how the proposal will be read, i.e, on a device, or as a physical document.

- **Business Acumen** – Beyond creativity and design, creating a winning proposal requires an in-depth understanding of the project being proposed, and the strategies, decisions and capabilities that impact the success of that project.

- **Industry Expertise** – Every proposal includes a section on the firm's honors, awards and qualifications, but winning proposals are more than a list of accolades. The best proposals demonstrate the firm's unique qualifications and ability to do what other firms cannot. If the firm provides exceptional client service, then make it a point to demonstrate the ways in which the firm goes above and beyond for its clients.

- **Digital Assets** – Architects, builders, designers and engineers all rely on digital assets to showcase their work, demonstrate their capabilities and promote their brand. As such, digital assets like charts, data tables, property images, 3D renderings and branding material are also an integral part of the proposal creation process.

As shown by the length of this introductory section, winning proposals require a lot more than one person can contribute. That's why, above all else, winning proposals require teamwork and collaboration from the entire firm.
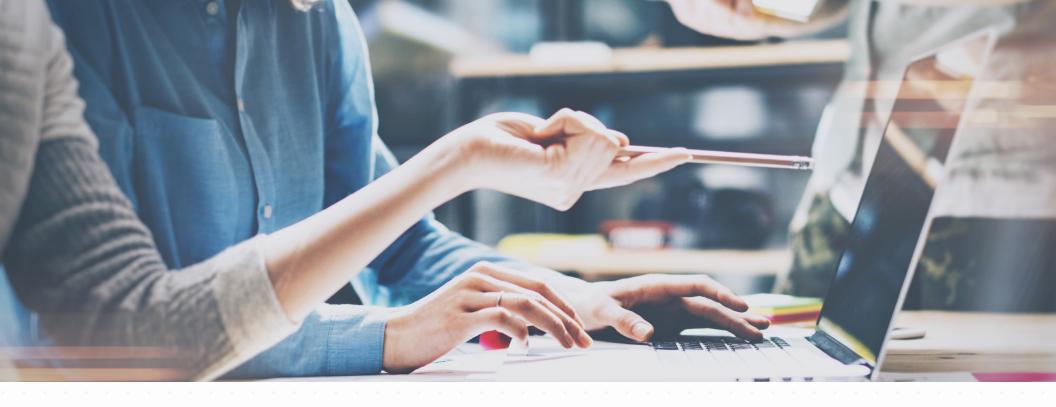
*Fortunately, there are tools available that enable collaboration and make the proposal creation process easier. You can read all about them in this guide on **How to Help Your AEC Firm Win More Business**.*

AEC Proposal Structure: What To Include in Your AEC Proposal

Now that you understand what it takes to write a winning AEC proposal, we can delve into the actual proposal creation process. Like building a skyscraper or erecting a home, creating a winning AEC proposal starts with a plan. Fortunately, the majority of AEC proposals utilize a similar structure.

▶ Cover Letter/Letter of Interest and Executive Summary

The cover page of your proposal is different from your cover letter/letter of interest and executive summary. The cover page is usually artfully done and contains branding material like the firm's logo, whereas the letter of interest and executive summary answer the question,

"What can your firm do for me and why should we hire you?"

This is the section in which you make the case for choosing your firm over the competition by providing the client with all the information they need to feel confident in their decision to hire your firm.

More than a list of accolades, your executive summary should highlight the gap between what the prospective client knows, and what they want to know. In other words, your executive summary should:

1. **Explain the Problem/Project** - Explain the problem/project in one or two sentences. Be specific and include quantifiable measurements, if possible. **Ex:** *Schools in this district have had systemic problems with chemically sensitive individuals becoming sick from off-gassing of various commonly used wall and floor coverings.*

2. **Describe the Desired Outcome** - Describe what will be different if the problem is solved, the need is fulfilled, or the goal is achieved. Do not provide any details of the solution just yet. **Ex:** *The building we erect will be a model of environmental protection and resource conservation.*

3. **Introduce the Proposed Solution** - In a series of short paragraphs, describe your solution to the problem and refer to the sections where that part of your solution is described in detail. **Ex:** *Our firm will use non-toxic, eco-friendly insulation, wall coverings, and floor treatments. We will hire subcontractors familiar with the installation of these materials and who pledge to use green building practices. See the Materials page for more details.*

4. **Illustrate How Your Proposal Overcomes Ris**k - Use plain language to describe the risks to your proposed solution and how your firm plans to overcome them. **Ex:** *The installation of landscape watering systems requires the removal of several large trees that will be saved and relocated. The nearby creek will also be preserved and protected. See the Environmental page for more details.*

5. **Ask for the Business** - In as few words as possible, describe the decision that you want the executive(s) to make. Be specific. **Ex:** *If you are as excited about our design concepts as we are, then we are pleased to ask you for the opportunity to develop a detailed plan with specific costs, schedules, and lists of subcontractors.*

▶ Project Understanding

The project understanding (alt. project description) section of an AEC proposal is a high-level overview of the project's objective, its essential qualities and the reasons why your firm would like to undertake the project.

Like an elevator pitch, the project understanding section should briefly answer the *"what"* and *"why"* of the project without delving into the *"how"*. Consider the challenges the client is dealing with and why those challenges affect them. Don't forget to briefly identify the site, key design/engineering features, aesthetic considerations and a broad timeline for the project.

The following is an excerpt of a project understanding section taken from a real **proposal submitted to the City of Portland** and related entities to deploy a new transportation and land use strategy in the area.

> *Forest Avenue is a vital link connecting downtown Portland to its most dense outlying neighborhoods, retail and employment centers, the University of Southern Maine, and also to the outskirts of the City of Westbrook.*
>
> *At present, the study area between Park Avenue and Woodford's Corner is most visibly used as a vehicular throughway by private autos. Two bus routes also use this section of Forest Avenue, although most passengers are not from the immediate vicinity of the study area...*
>
> *The [AEC Firm] team offers a project approach that will recognize these differences and will guide the city and the community in selecting a transportation and land use strategy that will be sensitive to the contextual details within and outside the study area."*

▸ Scope of Work (SOW) and Technical Approach

A Scope of Work (SOW) is a fundamental piece of every AEC proposal, meant to describe what the firm is looking to achieve as a result of the RFP. The SOW also helps to ensure that the firm meets the needs of the clients and establishes the parameters of what could be included in the resulting contract.

In other words, the scope of work section of the proposal should outline what your firm will do for the client. Often a client may provide a scope of work in the RFP and ask firms to address how they will approach that scope.

In this case, the scope should explain how the firm will perform the tasks outlined. It should also contain an overall timeline, detailed milestones, reports, charts, tables and all deliverables.

▸ Project Management and Project Execution Plan (PEP)

The project execution plan (PEP) is the section of an AEC proposal that governs project operations and management. It also establishes in appropriate terms what will be done to meet the project scope and contractual requirements. The goal of the PEP section is to:

- ○ describe a project specific plan in a strategic and tactical way;

- ○ address the most effective methods;

- ○ outline ways to maximize efficiency in project execution;

- ○ highlight project specific actions that comply to project goals and objectives;

- ○ provide detailed project risk management plans, and

- ○ detail how the project will be executed in accordance with the risk management procedures.

The following is an excerpt of a project execution plan created by **the U.S. Dept. of Energy** and related entities to build a physical science facility at the Pacific Northwest National Laboratory.

> "
> *The Department of Energy (DOE) is required under the Tri-Party Agreement with its regulators to complete surplus facility disposition and remedial action clean-up of the Hanford Site 300 Area by 2015.*
>
> *With about half of the space used by Pacific Northwest National Laboratory (PNNL) in the 300 Area supporting their research programs, the DOE Office of Science (SC) has undertaken the Capability Replacement Laboratory Projects (CRL). The CRL projects will ensure the long-term viability of the PNNL and preserve the following vital research capabilities."*

Project execution plans can differ widely depending on the size of the project and the client requesting the proposal. The PEP you create for one proposal may consist of a small section, whereas another proposal might call for an extensive document. Below you will find several project execution plans submitted to the federal government for a variety of different projects.

→ **Kansas City Responsive Infrastructure Project**

→ **Physical Sciences Facility Project**

→ **Environmental Restoration Projects**

→ **Sandia National Laboratories Project**

▶ Relevant Experience and Team Resumes

The resume and relevant experience section of an AEC proposal is the first chance the client gets to meet your team, especially your key personnel. Regardless of the agency, customer or project, the resume section of your proposal should contain:

- relevant experience,
- education,
- certifications, and
- training.

This information should be readily available and easy to access. If it is not, then it is best to hit pause on the proposal creation process to find a digital asset management system that can help you **create employee resume documents at speed**.

With a digital asset management solution like **OpenAsset** in place, it will be easier for your team to upload the necessary documents (resumes, staff photos, certifications, etc.) and move on to the first step in the process.

Step One: Tailor the Resume Section to the SOW

Relevance is key to creating a great resume proposal and the same is true of the resume section. Thus, the first step in creating a great resume section is to filter through resumes looking for past experience, skills, and areas of knowledge relevant to the specific project or task order. If the experience isn't relevant to scope of work, then it should be omitted.

Step Two: Provide Concrete Examples

Avoid language like *"leveraged expertise and lead development team to enhance system functionality."* It's deliberately vague and means nothing to everybody. Instead, provide concrete examples of the expertise applied and areas of measurable improvement. Don't forget to include the relevant facts and figures.

Step Three: Be Specific with Certifications

Many RFPs, especially government RFPs, distinguish between certifications and training because evaluators look for industry-standard credentials, which are not the same as a candidate's relevant skills and experience.

To give evaluators a better idea of a candidate's skills, it's best to list certifications apart from job experience. Listing them apart also makes it easier for evaluators to connect relevant certifications to job experience and where those skills were applied in a real-world setting.

Step Four: Emphasize What Makes Each Team Member Great

The best resume sections provide a brief paragraph describing the rationale for selecting this team member for the proposal role. Utilize the brightest moments of their relevant experience, as well as exceptional accomplishments, awards, and customer testimonials.

Remember, evaluators need to read through a pile of resumes, which means they are likely to skim through most of your proposal. It is, therefore, best to provide attention grabbing accolades near the top of the page. Don't forget to explain why individual team members are the perfect candidate for a proposed role.

Step Five: Avoid Jargon

Many proposal writers assume their audience is another architect/designer/builder like themselves. This is a misconception. Prospective clients have their own jargon and easily recognized acronyms. Therefore, it's best to ensure the resume section of your proposal is written in plain language. In other words, put it in layman's terms.

▸ Pricing

The pricing section of an AEC proposal is one of the trickiest sections because it contains the cost of the project, which is either too expensive or just right. It doesn't matter how good your proposal is if your bid is five times more expensive than other firms.

That said, the pricing section of your proposal still needs to be perfect. In general, there are three ways to price a project:

- ○ lump sum,
- ○ hourly, or
- ○ hourly with a not to exceed price.

If your firm has priced the project as a lump sum, it's best to break down those costs in a table. Hourly pricing should be broken out into hourly rates for each category of staff working on the project. If you have any payment terms, like "net 30," you need to state them in your pricing or attach terms and conditions.

Assumptions and clarifications should also be included in the pricing section. For example, if you are proposing to provide tree removal services, then one of your assumptions should be – *"We assume there are no underground gas lines within five feet of this tree."* Don't forget to identify every assumption and to be very clear about the services that your firm will not provide.

Best Practices For AEC Proposal Writing

Now that you know the structure of a winning proposal, the next step is to actually write and design it. Remember, the goal is not to write a contract or a summary document. The goal is to write a sales document that is meant to persuade the client that your firm is the right choice to complete the work.

- **Keep Pages to a Minimum** – Unless a longer proposal is required as part of an RFP process, shorter is generally better when you consider short attention spans.

- **Make Sure Your Proposal Is Delivered Correctly** – Direct your proposal to the right person (or people) and include any necessary information at the start.

- **Keep Deliverables and Pricing Separate** – Separate your offer into individual elements prospects can relate to.

- **Include a Range of Pricing Options** – Many salespeople find success by offering a range of prices. When a reasonable offer is presented next to a higher-ticket option, it looks even more reasonable, in comparison.

- **Utilize Copywriting Best Practices** – Proposal language doesn't have to be dry. Utilize relevant statistics to build authority, as well as specific language to paint a picture of the "before" and "after" conditions the client will experience. Include CTAs between sections to entice readers to move to the next section.

- **Don't Promise. Prove** – The best proposals include customer testimonials, case studies and any other relevant content that proves you can deliver what you're proposing.

- **Include Firm Information at the End** – Don't start your proposal with an "about us" or "who we are" section. Prospects don't really care. It's best to focus on the client and their problems rather than your company and its background.

- **Consider How the Proposal Will be Read** – It's the modern age, which means there is a good chance that your proposal will be read on a device, like a phone, tablet or laptop. Don't frustrate them with a viewing experience that isn't accessible across these different options.

- **Make it Signable** – Capitalize on the excitement your proposal creates by making it signable. Several different SaaS proposal delivery programs exist today that will turn your proposal into a signable contract.

RFP Response Tips for AEC Firms

Writing the content of an AEC proposal is a large part of the proposal creation process, but it is not the only part. Second only to the content of your proposal is it's design. Design also helps your proposal stand out from competing proposals and leaves the evaluators with a positive impression of your team.

▶ Use Impactful Photography

Wow prospective clients with unique and impressive cover design that features a high quality image of your best work. Feature impactful photography, videos and other digital assets that showcase the skills of your firm. The first glance at your cover will decide if they want to pick up your proposal and read what you've got to offer.

▶ Showcase Your Brand

Your branding serves to differentiate your firm from competing firms, and help evaluators recognize your proposal just by looking at your document. Do not be tempted to match your proposal's design (colors, fonts, style) to the brand of the client. Remember, the goal is not to imitate the client, but impress them.

▶ White Space Is Your Best Friend

To make your proposal clean and easy to read, it's best to let your designs breathe. Every element in your proposal (including logo, text, images, infographics, tables, etc.) should have enough white space around it to ensure it isn't confused with other elements.

▸ Pay Attention To Font

Most AEC proposals are text-heavy. Include a hierarchy to your text by using a different font for headings or using a different weight of the font used in the body. This makes your proposal visually appealing and easy to read.

▸ Use Thoughtful Graphics

Highlight important information in a compelling way by using thoughtful graphics, tables, charts and other digital assets that draw the reader's attention to the best parts of your proposal.

▸ Use the Right Tools

Designers can only create amazing work if they have the tools they need to create, share and manage digital assets like videos, images, graphics, rederings, etc. Fortunately, there are a number of martech tools available that enable designers to create and collaborate with the entire firm. Learn more about helpful martech tools in our guide on **How To Build a Marketing Technology (Martech) Stack**.

Edits and Revisions: Proposal Pre-Delivery Checklist

Like any sales document, an AEC proposal is not complete until it has been edited, revised and proofed for mistakes.

- [ ] **Spelling and Grammatical Errors** – Don't lose business on mistakes that can be easily caught and fixed. Run a spell check to ensure a clean document.

- [ ] **Ensure That All Required Elements Are Present** – Review your proposal one final time against any specifications covered by the prospect's RFP guidelines. Missing a single one could take you out of the running.

- [ ] **Ensure the Proposal Targets the Pain Points Identified by the Client** – This point is so important it's worth a final check. Does your proposal speak more to your needs or your prospect's needs? If it speaks to your needs, it needs to be revised.

- [ ] **Ensure Timelines Are Reasonable** – Don't risk disappointing future customers by promising timelines you can't realistically achieve.

- [ ] **Scan for Roadblocks** – Have you created an experience that makes it as easy as possible for clients to do business with you? If clients need to do anything more than agree with what you've written, decide on specific offerings and sign off on the deal, you need to remove unnecessary complications to your proposal.

Submit Your Proposal and Start Reporting

If you have completed all of the above, and you're proud of the proposal, then it's time to submit it and start reporting. For example, one might track the number of prospects who reach out with follow-up questions because something wasn't clear. Try using a SaaS proposal program to monitor how much time prospects spend viewing your documents. You could also track:

- number of proposals sent,
- number of RFP processes chosen as a finalist, and
- number of closed-won versus closed-lost deals.

The more KPIs that you track, the better your chances are of creating a better proposal for the next RFP.

Stay Up To Date on AEC Marketing and AEC Martech Solutions

We hope this guide on how to create winning proposals was helpful. As you go about answering RFPs, remember that there are a number of solutions out there to help you make better proposals and win more business. One such solution is OpenAsset, the only Digital Asset Management (DAM) solution designed specifically for firms in the built world. Contact OpenAsset today to

Schedule a Demo ›

About OpenAsset

OpenAsset is the number one project-based Digital Asset Management (DAM) solution for Architecture, Engineering, Construction, and Real Estate firms. It is delivered and supported by Axomic, which has a global presence with staff based in London and New York.

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