



RFP Fundamentals: Cover Letters and Executive Summaries That Sell

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“A couple of years ago, when the market was really hot, firms in the AEC industry could slap some boilerplate together into a proposal and win work. That is absolutely not true today. Today, the client isn’t getting 5 or 10 or even 15 proposals. They’re getting 50 proposals from highly qualified firms.”

That’s what Elaine Kanelos, Director of Business Development at OZ Architecture told a group of marketing and technical professionals at a recent SMPS education breakfast.

“If you’re not tailoring every one of your proposals to address defined and specific client needs, your proposals are not going to win work,” she added.

Kanelos co-presented with Marketing Evolutions LLP partner Martha Cusick Eddy on new ways AEC firms can convey through proposals the value they can bring clients.

“Proposals are an opportunity to show clients what it will be like working with you and your firm. Show them you’ve done your homework, gone the extra mile to understand their needs. That’s how you’ll differentiate,” Cusick Eddy told the audience.

The first step to generating a competitive proposal – one that wins work or gets you to the shortlist – is to understand why clients issue RFPs and what they are trying to learn from them.

“There are a number of reasons why clients issue RFPs. In some cases, it’s to conduct a side-by-side, apples-to-apples comparison of multiple firms. In other instances, the purpose is to solicit ideas and solutions or generate a higher degree of comfort with a front-running firm,” Cusick Eddy told the audience.

But to be competitive, particularly today, proposals must address two sometimes divergent client needs – their stated and unstated objectives.

“Proposals often serve multiple purposes. There are stated objectives, such as your team’s experience, your technical approach, and then there are the unstated questions a client wants answered through the proposal process. Unstated needs are softer and more nuanced: Will this team execute their vision or my vision? Will they listen to me? Will I trust them? Do they



truly understand my project, my situation, and will they propose solutions that uniquely meet my needs,” she said.

Before you begin a proposal writing exercise, proposal teams, including the marketing and business development team, as well as the technical professionals who will work on the project, must meet and conduct a thorough review of the client’s chief needs.

Cusick Eddy recommended a needs analysis worksheet that enables the proposal team to identify a client’s needs and align their services or solutions to meet those needs.

“The key is to conduct this exercise from the client’s point of view. Everything you discuss – from the problem or challenge to the solution set your team will propose – must be seen from the vantage point of the client.”

Rather than only relying on assumptions, Cusick Eddy suggested proposal teams do their due diligence prior to meeting with the technical team.

“There are so many sources of information today. Ideally, you have been tracking a project before it has moved to the RFP stage. In that case, go directly to the source. Ask the client insightful questions that will help you uncover their key needs – those spoken and unspoken requirements – in an RFP.”

If you don’t have a relationship or the RFP process is public and direct contact difficult, review past projects and talk to owners of those projects. What key needs did they have? Did teams present unique solutions? How did they make decisions based on the challenges presented by the project?

Finally, once you’ve assembled the client’s needs, issues and challenges and aligned your solutions and benefits, you are ready to write the proposal.

“Cover letters and executive summaries are critically important,” Kanelos told the audience. “In my experience, many project selection boards are comprised of people who have full time jobs other than reviewing proposals and selecting project teams. They are busy. They may not be technical experts. They may not have the time or inclination to read the proposal cover to cover.”

Executive summaries and cover letters may be the first places selection teams go to see if a proposal is worth reading. This is valuable proposal real estate. Proposal teams must use these sections to clearly define why they are the team to choose. The value they offer, the



understanding they have of the project and the inherent (and sometimes unanticipated) challenges, and the innovative solutions they can bring must be immediately apparent.

“We always seem to wait to the last minute to write the cover letter or executive summary. Don’t make this mistake. Yes, both should be written toward the end of the proposal development effort so they reflect the entire proposal, but they should be central elements to the process, not afterthoughts,” Kanelos said.

Cover letters must set the tone for the entire proposal and make the reader want to learn more. In some cases, they serve as the executive summary. In others, they will complement the content of the summary. Both should reflect what the reader needs to know and be written in a personal style – use “you” and “your” and reference the project.

Cusick Eddy noted that “it is important to show your reader why you are the right choice. Stories and examples are priceless. They demonstrate value from another client’s point of view. They demonstrate what you have done and what you can do for this client.”

Details matter in proposals, too. Don’t forget to use proper grammar and formal letter style. Keep your executive summaries short and to the point. Know who should sign the letters and how. Sometimes an electronic signature is appropriate. Other times, only blue ink and an original signature will do.

“I like to use this approach. Tell them what you are going to tell them, tell them, and then, tell them what you told them. Again, these selection teams are busy. We need to reinforce the message,” she noted.

Kanelos recommends using bullet points in both documents and making sure you are clear on the top three to five points you want the reader to remember.

“These are critical points in the proposal where you can show your value. Demonstrate to clients that you get it. You’ve done your homework and you know what matters to the client and to the project,” Kanelos added.

To receive a copy of the client needs matrix that Marketing Evolutions recommends A/E/C firms use, please contact Martha Cusick Eddy at martha@marketingllp.com. For more information on cover letters, executive summaries or the proposal process, please contact Elaine Kanelos at ekanelos@ozarch.com or Dena at dena@marketingllp.com



As an added value to our members, their firms and the A/E/C industry, SMPS Colorado has teamed with Marketing Evolutions to recap our education sessions. Please fill free to share this with others.



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