

How to Prepare a Winning Proposal

FROM THE FREELANCE WORKSHOP

By Michelle Dalton

Thoroughly assessing the scope of work a potential client desires, outlining each party's responsibilities, and defining the deliverable are paramount to developing a winning proposal, said Brian Bass, president of Bass Advertising & Marketing, during the AMWA-DVC Fifth Annual Freelance Workshop on April 21, 2007 in Blue Bell, Pa. Bass advised attendees to analyze the assignment proposal with the same attention to detail they would give the actual project. Every medical writer should analyze the assignment, formulate the price, draft the proposal and seal the deal. Knowing what you're worth and charging appropriately go hand-in-hand with negotiating effectively, he said.

Ask about Details

First and foremost, analyze what it is you are being asked to provide to the client. "If nothing ever existed, you'll need to factor in time for research, maybe analyzing results from a clinical study. If you're writing something new from something that already exists, you'll be streamlining current information," he said.

Do not presume, however, that initiating something will take longer than revisions to existing documents. "If the client has an 'outline' of what's expected, it's often not referenced or sourced and may be worse than starting something from scratch," he said.

"Don't overlook the references section, either. Are you looking at a truckload of studies and data to go through, or is it a box load? All of these will factor into the amount of time it will take to produce what the client expects."

Next, consider the desired end product. "A four-page slim jim is significantly different from a 28-page detail aid, which is very different from a 52-page technical monograph," he said. "There's a big difference in the type of deliverable a client may want. Just because it's a longer piece doesn't mean it's going to involve more work on your end."

Extenuating Factors

Before submitting the proposal, Bass advised attendees to consider extenuating factors, such as:

- Amount of personal experience in the therapeutic area, with the medium, or with the potential audience.
- Timelines: Does the deadline involve working evenings and weekends, or would you have plenty of time to complete the job?

“Always ask yourself about the hidden expectations,” he said. “Things might not be on anyone’s radar unless they’re asked about – the client may presume you already know what’s expected.”

In particular, he advised clarifying up front:

- Who will identify and recruit authors, faculty, or reviewers
- Whether you’ll need to attend any meetings:
 - ? At the client’s headquarters
 - ? At the client’s client
 - ? At an advisory board across the country
 - ? At a conference overseas
- Who writes the submission letter, the reviewer responses, and subsequent drafts

Pricing the Proposal

Once you understand the preliminaries, then and only then should you start to develop a price for the proposal. “You need to determine, based on all those parameters, how much time will the project really take,” he said. “Time is what I sell. What’s reasonable and what it’s worth to the client will depend on the project parameters, client expectations/needs and the perceived value.” He added that, upon occasion, he will lower a price for a good client, or one with a considerable amount of repeat business.

What he won’t do, however, is charge an hourly rate, and he suggested no one else do that, either. “Charging by the hour punishes the proficient and rewards the inefficient,” he said.

As an example, he cited the case of a writer who estimates a project will take 50 hours and charges the average AMWA rate of \$85 an hour. “The first time you do that project, you’ll make \$4,250,” he said. As the years go by, you will be charging more on an hourly basis, say \$125 an hour. “But with experience, the amount of time you spend on a project you’ve done before decreases. So that same project that you made \$4,000 on when you first started out is now only earning you \$2,500 years later as it only takes you 20 hours to complete,” he said. “You’re working twice as hard to do the same project as you were when you were a novice.” Taking the same scenario, if you charge the client \$4,250 when you’re a novice and keep a project-based proposal in place, years later when the project only takes 20 hours to complete, “you’re actually making \$212.50 an hour.”

Formulating the Price

Formulating the project price should be a combination of several variables, Bass said. “You should analyze it several different ways,” he said. Calculate the time it will take to produce a quality piece, add in your desired hourly rate (using this as one lump sum for the project), how long it has taken to do a similar project in the past, and the value of the project to the client.

“Then I do a reality check,” he said. “I phone a friend to see if what I’m going to propose is reasonable or not. Sometimes you really can undercut yourself.”

Key Pearls

Bass said your proposal:

- Should act as a timeline, detailing what's done in each step and by whom
- Is a promise that you understand what the job entails
- Is a contract, defining the responsibilities of each party involved.

Lastly, he provided some tricks of the trade:

- Itemize revision drafts separate from the first draft.
- Itemize each deliverable separately.
- Specify what is and is not included, such as out-of-pocket expenses for travel or obtaining references.
- Specify a payment schedule for longer projects (e.g., breaking payments into thirds).

“Promise what you will deliver and deliver what you promise,” Bass said. “It’s a tall order, but we are in the service business. We solve problems for clients. Be on time, on target and on budget the first time and every time.” Never negotiate a fee once it’s been proposed; instead, negotiate the deliverable, he advised.

Michelle Dalton, medical writer and director of Dalton & Associates, specializes in the development of manuscripts, abstracts, posters and monographs.