Writing for the Biggest Customer in the World

Efficiencies and Inefficiencies in Proposal Writing

by

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ABSTRACT

Contracting is an integral component of both government (i.e., public) and private business. As part of the contracting process, contracting companies must submit proposals to federal agencies or private businesses; individuals who write proposals on behalf of contracting companies are known as proposal writers. Although proposal writers are central to the proposal writing process, they are only marginally represented in available literature on the contracting and proposal writing processes. Additionally, available literature is disproportionately influenced by industry and trade sources, versus academic sources, and completed by industry authorities. As a result, key findings from such reports may not reflect the feedback gathered as part of this research. This research utilized a 25-question survey with both multiple choice and free answer questions to gauge the most and least effective components of the proposal writing process.

Communication and collaboration—internally within the proposal team or within the company, and externally between the company and customers, clients, etc.— were cited as both the most and least effective components of the process. Notably, however, communication and collaboration were not the most frequently encountered issues, as only 23.5% of proposal writers reported communication as a common issues. Instead, supporting resources (46.9%), time/ schedule (49.2%), and direction. instructions (44.9%) were reported as the most common issues that proposal writers encountered, although one in four participants noted that issues were not consistent across proposals.

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CHAPTER 1

INTRODUCTION

In 1979, Herman Holtz asserted that the U.S. government "is undoubtedly the biggest customer in the world" (Holtz 1979). Considering the buying power of the government (approximately $7.8 trillion was obligated for fiscal year 2022 alone), it is unsurprising that a great deal has been written on the subject of government contracting since Holtz. This wealth of information is available from the viewpoint of both sides of government contracting: from federal agencies themselves, and the contracting companies who do business with these agencies. Government contracting dates back to the advent of the U.S. as a nation. However, government contracting as we recognize it today took its form in 1966, when guidelines and procedures emerged on what services could or could not be contracted out, as outlined in OMB Circular A-76 (Executive Office of the President, 1983).

Government contracting is also known as public sector contracting; and though it remains one of the most lucrative agencies, it does have a counterpart: private sector contracting. Private sector contracting, as the name implies, deals with privately held companies versus tribal, local, state, or federal governments. This form of contracting, despite the difference in customer, functions in the same manner.

Contracting is a subject that is hostile to newcomers in part because of its language and specific terminology. For contextual purposes, here is a simplified explanation: when an organization seeks to contract out work, it releases a solicitation, also known as a Request for Quote (RFQ) or a Request for Proposal (RFP) for government entities, with the relevant details of the work. In order to formally respond to this solicitation (known as 'bidding'),

a proposal writer researches, develops, and submits a proposal to the government agency or organization. The goal of the proposal is to convince the government agency or private organization that the contracting company or freelancer should be given (i.e., ‘awarded’) the work.

Individuals who write these proposals are known as proposal writers. They may work individually or as part of a larger team, depending on the contracting company or freelance organization. For the purposes of this study, the proposal writing process spans the length of time from when a proposal writer receives a solicitation assignment (either in response to a formal solicitation from the government or in anticipation of a formal solicitation) until final submission of the proposal.

However, it may be surprising for readers to learn that there is little information from the viewpoint of the writers who actually develop proposals. A wide variety of information is available on how to write proposals, best practices, and general recommendations. But while most of it is written for proposal writers, almost none of it is written by proposal writers. Similarly, though there are some industry organizations which seek to take the pulse of the proposal community at large, there are few studies, either qualitative, quantitative, or mixed methods, which focus on proposal writers, specifically, and their experience with the proposal writing process.

This research attempts to begin correcting that oversight by surveying proposal writers from contracting companies and freelance organizations. The insight provided on effective and ineffective processes, in addition to the underlying causes or contributing factors, supplements the information on proposal processes, writing challenges, and best practices from current industry benchmark reports and bodies of knowledge.

This study proposes to use a quantitative approach to accomplish this goal and begin filling the identified knowledge gaps. This study seeks to answer, at least in part, the following questions:

- What are the most and least effective components of the proposal writing process for contracting companies, as identified by proposal writers within this field across contracting companies and freelance organizations?
- For the identified most and least effective components of the proposal writing process, what are the components' corresponding causes or contributing factors, according to proposal writers?

The most and least effective components of the proposal writing process for contracting and the underlying causes or contributing factors provide insight into successful processes. 'Success' here refers to a subjective viewpoint, which will be defined by each study participant, further providing insight into how proposals are viewed by those who work on them.

Besides filling a gap in the current literature on proposal writing from the proposal writer's perspective, this research may also provide a better understanding of commonalities in effective and ineffective components of the proposal writing process that either bridge, or are specific to contracting companies of certain socioeconomic groups, geographic regions, or other demographic factors. This will also have the distinction of being one of the few academic-based studies on this topic, since the majority of literature to date falls within the industry or trade sectors.

CHAPTER 2

LITERATURE REVIEW

There are two primary organizations that provide literature regarding public and private contracting: the Association for Proposal Management Professionals (APMP), an international industry authority, and Loopio, one of the highest rated international RFP software companies. APMP releases periodic industry benchmarks reports, which are comprehensive research covering every aspect of contracting. APMP most recently released an industry report in 2019 and is projected to release another industry and benchmark report in 2023.

Loopio releases annual reports, but the reports are limited to industry top trends for the corresponding year. Additional literature includes a joint report from Unanet and CohnReznick, companies which provide enterprise resource and customer management technology solutions for government contracting companies. Relevant portions of literature from APMP, Loopio, and Unanet and CohnReznick will be discussed in the following sections.

However, it is important to note that APMP's research is limited by the fact that it only polled APMP members. Additionally, exactly half (50%) of respondents in Loopio's 2023 report were APMP members and the report was developed in partnership with APMP. Also of note is that the Loopio 2023 report was the first that expanded beyond North America, and solicited feedback from RFP teams in Europe, Asia, Australia, and the United Kingdom. Regarding Unanet and CohnReznick's report, it does not disclose participant information (beyond stating that more than 1,400 individuals responded to the survey), describe research instruments or methods, or provide margins of error.

Expanding beyond the narrower scope of this research, there is a great deal of literature available that discusses topics related to proposal writing. Such research includes studies on learning needs of contracting personnel (Crawford, Siegel, & Kerr 1990), automated contract writing systems (Lloyd 2012), and how proposals are conceptualized and taught (Lawrence, Lussos, & Clark 2017). But while each of these and other studies like them contribute to knowledge of the field overall, they fail to specifically focus on actively practicing proposal writers within the industry.

There have also been a number of books written on the subject of proposal writing. Herman Holtz, mentioned in the first sentence of the introduction, wrote one such book. Additional early texts on this topic include *Proposal Planning and Writing* (Miner & Griffith, 1993) and the *Handbook for Writing Proposals* (Hamper & Baugh, 1995). Texts on this topic continue to be published more recently, including *Writing Proposals* (Richard Johnson-Sheehan, 2008), *The Project Proposal Writing Handbook* (Chikati, 2007), the second edition of the *Handbook for Writing Proposals* (Hamper & Baugh, 2010), and *Proposal Writing for Government Contracts: How to Organize and Write Winning Competitive Proposals* (Corbett, 2011), which specifically discusses federal contracting.

There are even field-specific texts available, such as *Proposal Writing for Nursing Capstones and Clinical Projects* (Bonnel & Smith, 2014), the topic of which is self-explanatory, and *Proposal Writing: Effective Grantsmanship for Funding* (Coley & Scheinberg, 2016), which focuses on proposals for community services. There is even a *Writing Business Bids and Proposals for Dummies* (Cobb & Divine, 2016) variant available.

However, the usefulness of such texts is limited. Again, while the authors have participated in the proposal writing process, their roles are not limited to those of active proposal writers. Similarly, the pace of emerging and evolving technology (AI-generated content is one such example), compounded by general changes within the industry, limit how applicable these books are for analyzing the current state of the industry for proposal writers, the issues and challenges they face in the workplace today, and the most and least effective components of the proposal writing process.

As a result, despite the fact that this literature provides valuable insight into contracting and the proposal writing process, it still perpetuates feedback that comes from those who work with proposal writers, rather than providing feedback from proposal writers directly. Thus, soliciting and analyzing feedback from proposal writers on the process, as they understand and interact with it, will provide insight into the field as it currently exists for this profession.

Proposal Writer Representation

In APMP's most recent U.S. Bid & Proposal Industry Benchmark Report, participants spanned the breadth of proposal-related positions within contracting companies (i.e., the participants were not limited to only proposal writers) (APMP 2019). Only 16% of respondents in the 2019 study identified as proposal writers, although 45% of respondents stated that they fulfilled secondary responsibilities (e.g., the 43% in the 2019 study that identified as proposal managers could also be functioning as proposal writers).

Similarly, Loopio's 2023 report showed that only 11% out of 1,500 respondents listed 'RFP/Proposal Writer' as their role (Loopio 2023). This was the first year proposal

writers were given their own category; Loopio's 2022 and 2021 reports combined the proposal writer role with that of the RFP manager. Even so, in 2022 RFP/proposal writers and managers only comprised 27% of respondents, and in 2021 this dropped down to 26% of respondents. However, in 2020, 51% of respondents were RFP/proposal writers or managers.

Unanet and CohnReznick's report also did not reflect insight from proposal writers (Unanet 2021). In fact, 'proposal writer' was not even included in the list of respondent job titles provided in the demographic data collection section.

Best Practices and Repeatable Processes

Per AMP's report, 70% of respondents stated that their company had established best practices and 66% have a documented proposal process. For those with a documented proposal process, 23% and 59% reported that the process works very well or somewhat well, respectively. A majority of professionals rated best practices as extremely important to their work.

The best practices referenced in the key findings above are outlined in the APMP's Body of Knowledge, which APMP claims is vendor-neutral (Adra 2022). The APMP Body of Knowledge was reviewed and approved based on, in part, research from Shipley Associates. Shipley Associates is another industry authority that sets best practices and offers its own body of knowledge via the Shipley Proposal Guide (Newman 2019).

Loopio's 2023 report highlighted processes moreso than best practices. Participants noted that contracting companies were spending more time writing RFPs, but that it didn't necessarily correlate to increased awards. Instead, feedback indicated that participants

believed that more time should be spent choosing higher-quality RFPs and on gate decisions (i.e., decisions about whether to pursue a RFP).

Technology and Resources.

APMP's 2019 report showed that access to technology and document resources was hindered by a need for routine maintenance and revision. Of those with access, only 80% could immediately use proposal templates, 67% could use content document libraries, 50% could use references, and 54% could use capability statements.

Loopio did not report on access to technology and resources, but instead focused on usage. In the 2023 report, 49% of participants reported using RFP software, but those that did use it reported that the top benefit was content storage (i.e., content document libraries) and maintenance. Reports cited RFP software as not including cloud storage or sharing, email, offline software, and messaging apps.

In both 2022 and 2021, 69% of respondents reported using dedicated RFP software. For those who used RFP software, the top three reported benefits for both years were content storage and maintenance improvement (just content storage improvement for 2021), time savings, and automation of tedious/ manual tasks. Lower ranking benefits included improved SME collaboration and increased team contribution for RFPs. Additionally, for the 2022 report, specifically, when asked if they had the resources and tools needed to efficiently and effectively respond to RFPs, 71% respondents who used RFP software indicated yes, versus just 45% of respondents who do not use RFP software. This is a larger gap than in 2021, when 70% of respondents who used software reported in the affirmative, versus 60% who did not use software but reported in the affirmative. In 2020, 80% of respondents reported using RFP response or proposal management software;

this language differs from the 'RFP software' cited in later reports and therefore may have allowed for broader software inclusion.

In 2021 and 2020, Loopio also questioned participants who did not used RFP software on their reasons for not investing in RFP software. The top three answers for both 2021 and 2020 were that respondents already used other tools/ systems that worked (first place for 2021 and second place for 2020), respondents didn't feel it was needed (second place for 2021 and first place for 2020), and that there was no budget for software (third place for both years). For those who did use RFP software, one of the greatest benefits reported in 2020 was better collaboration (although only 8% of respondents cited this benefit).

Loopio also assesses RFP team sizes and contributors (i.e., human resources). The RFP team consists of individuals directly involved in the response process, such as proposal writers and proposal mangers; contributors are individuals who are not only the RFP, but who may assist or provide input on proposals, such as SMEs.

In 2022, the average RFP team was eight people, but the majority of respondents (19%) reported that their team size was eight to 10 individuals. The majority of respondents (44%) reported that they used an average of 10 contributors per RFP response. In 2021, the average team size was eight people (but the majority [20%] had team sizes of just one to two employees) and the average number of collaborators involved was nine. In 2020, the average team size was seven (although the majority (39%) had team sizes of eight to 10 people), but the average number of collaborators was nine. And in 2019, while the average team size wasn't collected, the average number of collaborators was seven.

Common Challenges

Loopio reported that an increasing number of RFP teams had a dedicated proposal manager or other process owner to provide direction, answer questions, and facilitate access to resources (55% of teams in 2022, up from 42% in 2021 and 37% of 2020). Despite this, collaboration with subject matter experts (SMEs) was the greatest challenge: 51% of respondents cited this as the number one issue; 'finding answers' was the second greatest challenge and 'meeting deadlines and dealing with delays' was the third greatest challenge. Notably, 4% of respondents claimed to have no challenges whatsoever.

Collaboration with SMEs was also the greatest challenge cited by respondents in 2022 (45%). The two greatest challenges after SME communication were 'finding up-to-date, accurate answers' (a narrower but related challenge to the second greatest in 2023) and 'manually formatting responses.' Just 2% of respondents stated that they had no 'real' challenges.

In 2021, the top challenge was 'finding up-to-date, accurate answers' (46%), followed by SME collaboration (44%) and 'choosing the best answer from a group' (40%). A comparably large 5% of respondents said they had no 'real' challenges.

In 2020, the top challenge was 'finding accurate answers quickly' (44%), another variation on the 2021 challenge wording. The second greatest challenge was 'collaborating with internal experts' (43%), which includes a broader scope of personnel than just SMEs. The third greatest challenge was 'choosing the best answers from a pool' (36%). Similar to 2023 and 2022, 3% of respondents reported having no 'real' challenges.

Additional challenges that participants reported included meeting deadlines/ dealing with delays, burnout, bandwidth, gate decisions, formatting, project duplication, consistency in branding and tone, and resources/ budgets.

Cohn and Reznick's findings supported this. The top challenge reported by participants was a lack of communication, although the majority of communication challenges centered around the customer and Contracting Officer. The second highest reported challenge was unrealistic timelines from solicitation to due date, which related to Loopio's 2023 second greatest challenge. The third highest reported challenge was lack of clarify about work scope, which could relate to Loopio's 2023 second greatest challenge of 'finding answers,' but presumably relates to a wide variety of contracting and proposal-related questions.

CHAPTER 3

METHODS

Research Design

The primary purpose of this research is to analyze (1) the most and least effective components of the proposal writing process and (2) corresponding causes or contributing factors, as identified by proposal writers. A survey was the most appropriate method for this study. Surveys offered the following benefits: consistency in data; allowance for one-to-one comparisons, clearly showing percentages and trends based on answers to questions; providing structure to subjective data, which otherwise may be hindered by perception or the participant's ability to clearly verbally communicate; and ease of access using the Google Forms software. Additionally, since this research specifically limited participants to proposal writers, quantitative data was needed for comparison to current literature, which also heavily utilized quantitative data via surveys. Although the data resulting from this survey cannot be abstracted to current literature, using the same methods does provide for more equal comparisons. Surveys have notable downsides, however, including a lack of control over respondents, which means that survey participants may not necessarily be indicative of proposal writers as a whole; a lack of tangible evidence that respondents are active members of the desired population (i.e., proposal writers); the use of limited questions in order to avoid participant fatigue, which also limits the possibility of spontaneous data discovery; prioritizing data consistency over data depth; and potentially skewing data by limiting responses to specific answer choices.

Survey questions are provided in Appendix A and included both multiple-choice (quantitative) and free answer (qualitative) questions. Respondents were provided the

ability to select more than one answer for several multiple-choice questions. There were no word count requirements or limitations for free answer questions; respondents were allowed to be as in-depth or succinct as desired. Including free answer questions helped mitigate, at least in part, the limitations of surveys and other strictly quantitative research methods. Despite this, it is important to note that this research represents only initial data and requires further research using more focused methods, as cautioned by Meloncon and Amant (2019).

The survey was developed according to Plumb and Spyridakis' (1992) suggested approach for conducting research involving survey. Related to the initial creation process, this approach includes the following steps: (1) determine research questions, (2) identify and sample population, (3) administer questions, (4) construct questions, and (5) test questions. The questions were determined based on the research goals previously established (identifying efficiencies and inefficiencies in the proposal writing process as seen by proposal writers) but were also informed, in part, by industry literature and the questions used in such research. The population and sample were established with these goals in mind. The survey design, distribution method, and use of incentive was also geared to best appeal to proposal writers, in that the survey was brief, available online, and included the chance for monetary compensation through a gift card. After construction, questions were peer reviewed by both fellow proposal writers, fellow Technical Professional Communication (TPC) graduate students, and professors working within TPC fields. Question order, language, and answers were adjusted based on feedback. This review also served as a pilot test, specifically with fellow proposal writers.

The survey was cross-sectional, as all data was collected during a specific period. Survey data was initially solicited via direct messaging on LinkedIn and through email, but later transitioned to solicitations via freelancing networks and employment sites. The survey was hosted on Google Forms and participants were invited to participate via a link. As part of the survey, respondents were required to read and agree a consent form prior to receiving access to the actual survey questions.

Philosophical Worldview

This research is based on a pragmatic worldview, which emphasizes finding solutions to a specific problem using whatever methods are available, with additional focuses on the causes and consequences of that problem. Quantitative methods with some qualitative allowances were used to explore the most and least effective components of proposal writing, which aligns with the pragmatist approach of using available avenues to understand the research questions. As Rossman & Wilson (1985) argue, the pragmatist approach is particularly suited to the integration of both quantitative and qualitative research methods in order to use one method to corroborate, elaborate, or initiate findings from the other method during the analysis stage. This survey used the qualitative components of the survey (the free-answer questions) or corroborate and elaborate on findings from the quantitative components of the survey (the multiple choice questions).

Participant Recruitment

Participants were recruited through (1) professional networking applications/ websites, including but not limited to LinkedIn and Indeed, (2) industry organizations, such as the Association for Proposal Management Professionals (APMP), Shipley Associates, and the Society for Technical Communication (STC), (3) contact with current and former

working professionals, and (4) freelancing network and employment applications/ websites. All potential participants were sent a recruitment message through a direct messaging system or email. The recruitment message provided the purpose of the study, participant criteria, and a link to the survey.

Applications/ websites were selected according to how well each application's goals and purposes aligned with those of this study, per Breuch's recommendation (2018). LinkedIn and Indeed, for example, were selected because they function as social networking applications that emphasize careers; they also allow users to search and filter for current professionals that meet specific criteria. This allowed for easy identification of potential survey participants who were within the U.S., active proposal writers, and employed by government contracting companies. These applications also have direct messaging systems, which aided with outreach. After process deviations shifted criteria to only require potential survey participants be active proposal writers (reference the *Population and Sample* section for more information), freelancing applications such as UpWork were more appropriate for outreach. UpWork and similar freelancing sites also have search and filter functions for users, along with direct messaging functions, but are have greater international representation. Additionally, as these applications specifically cater to freelancers, initial barriers to recruitment were lessened. Freelancing websites were also better suited to outreach because freelancer accounts were all individually-based, whereas social networking accounts could be created on behalf of individuals or organizations (although it is important to note that client accounts on UpWork can be created on behalf of organizations).

There were several assumed risks for the study that were anticipated to negatively affect participant recruitment. These included that (1) industry professionals may be hesitant to provide data that could be leveraged against their company by competing companies; (2) that industry professionals may need special dispensation to discuss their job because their position deals with confidential unclassified information or classified information; and (3) that the assumed benefits of increased industry, increased academic knowledge, and entry into a drawing for a gift card were not enough incentive for industry professionals to provide their time and insight. These risks did prove to negatively affect recruitment, which in turn affected the target population and sample of the survey, as discussed in the following section.

Population and Sample

The population of the study was initially limited to individuals aged 18 or older who were currently employed as proposal writers for federal government contracting organizations within the U.S. Individuals within this population were identified by affiliations with relevant industry organizations such as APMP (i.e., membership lists, member directories, etc.), self-reported data on networking sites, and outreach to individuals who identified as proposal writers prior to the beginning of the research. However, survey participants who met these criteria did not respond to outreach. Further investigation into sourcing participants who met these criteria via survey sourcing organizations was also unsuccessful, the reason being that the participant pool was too niche and could involve highly sensitive information disclosure.

A process deviation for the recruitment method was thus necessitated; the participant pool was widened to individuals aged 18 or older who were currently employed

as proposal writers, and geographical limitations were removed. Outreach to participants shifted to freelancing networks and employment sites, including UpWork. The population was geographically dispersed and included domestic and international participants. The sampling design relied on cluster procedure and population stratification was not used.

The sample originally sought to include at least 50 survey participants. The survey sample size was derived from selecting a faction (roughly 3%) of the total participants in the APMP report (roughly 1,750 individuals). By the end of the recruitment period, 49 proposal writers participated in the survey.

Survey Protocol

All outreach to survey participants included a survey link. The survey consisted of 25 questions and was projected to take between 15 and 30 minutes to complete (see Appendix A). A consent form was included in the survey, which participants were required to sign prior to proceeding to the survey questions. The survey was hosted on Google Forms. Once started, participants were required to either complete or quit the survey; participants were not allowed to leave the survey to complete it at a later date or change their answers after the survey was submitted. Participants were only allowed to complete the survey once, which Google Forms enforced by tracking IP addresses and emails. Participants were not provided with copies of their answers once the survey was completed.

A master list of survey participants was recorded using a Microsoft Excel spreadsheet. The spreadsheet contained the participant's first name or first initial of their first or last name, outreach method, and indication of whether they completed the survey. Each participant was assigned a number in the spreadsheet. Survey participants were required to provide confirmation of the survey by providing the first name or first initial of

their first or last name used in the survey and a screenshot of the acknowledgement message after the completion of the survey. The first name or first initial of their first or last name was manually confirmed by viewing survey responses.

Following their participation, survey participants were entered into a random drawing for a $50 Amazon gift card. Each survey participant's assigned number was entered into a random number generator application. The corresponding survey participant of the selected number was notified and required to confirm an email for the gift card. The winning participant was contacted every 12 hours for a period of 72 hours (three days); in case the participant did not respond within this time, a new winner would have been selected using the same methods.

Data Analysis

Due to time constraints, simultaneous procedures were used (i.e., completed surveys were analyzed during the time period in which participants were still completing surveys). There were two major recruitment waves: the first 17 participants, which responded within one week after shifting recruitment protocols, and the final 32 participants, which responded in the last two weeks of the recruitment period.

Kinoshita's (2003) modified grounded theory was utilized during the coding process for qualitative data (i.e., free answer questions). As such, the responses to free answer questions were coded using a two-stage process. During the first stage, open coding was used and responses for each free answer question were transcribed verbatim into corresponding documents. Each set of responses to questions were read through three times; patterns that appeared on the second read-through were highlighted (one color for each pattern) and grouped into concepts. Open cording was followed by selective coding,

which sorted the concepts into thematic categories. Highlighted portions of responses were again read through at least twice and sorted according to emerging thematic categories. Text was also run through software to identify the most and least used words or phrases in the texts. Results were compared to the thematic categories for two purposes: (1) to see if results aligned with the thematic categories and (2) identify any missed patterns or concepts. The following concepts were identified for each set of responses to qualitative questions:

- About the Proposal Writing Process – Primary, secondary, and tertiary steps; individual-based or collaborative proposal writing processes; and client centricity.
- Most Effective Components of Proposal Writing – Relationships, processes, sections, components, and approaches; and client centricity.
- Least Effective Components of Proposal Writing – Communication and the writing process, insufficiencies, proposal writing/ language, and financial components.
- Methods to Address Challenges – Communication and escalation, language adjustments, additional research and reviews, adjusting visual components, software, and risks; writer initiation; and challenge resolution ("help").

The development of codes in dialectic relation to data and researcher background aligns with Smagorinsky's (2008) approach to coding, although the suggestion of collaborative coding was not utilized due to time constraints brought on by delays during the participant recruitment process. However, the use of software to identify the most and least used words and phrases did partially mitigate risks related to individual coding primarily related to subjective bias.

Only the researcher and corresponding participants had access to the survey. Only the researcher had access to the raw data from the surveys. Raw data was stored locally in specific files on a password-protected laptop for a period that will not exceed three (3) years. Raw data was not and will not be shared. Participants did not have direct access to other participant contact information or raw data. Aggregate results were not shared with survey participants. Aggregate results were completely anonymous; no individual participants were identified.

CHAPTER 4

RESULTS

Proposal Writer Representation

The participating proposal writers worked for government organizations, private organizations, educational institutions, and freelance organizations. Over half (51%) work for a small business (see Figure 1). Additional socioeconomic designations included small disadvantaged business (20.4%), 8(a) (2%), HUBZone (6.1%), women owned (10.2%), economically disadvantaged women owned (6.1%), veteran owned (12.2%), Alaska native owned (2%), Indian owned (4.1%), and Native Hawaiian owned (2%).

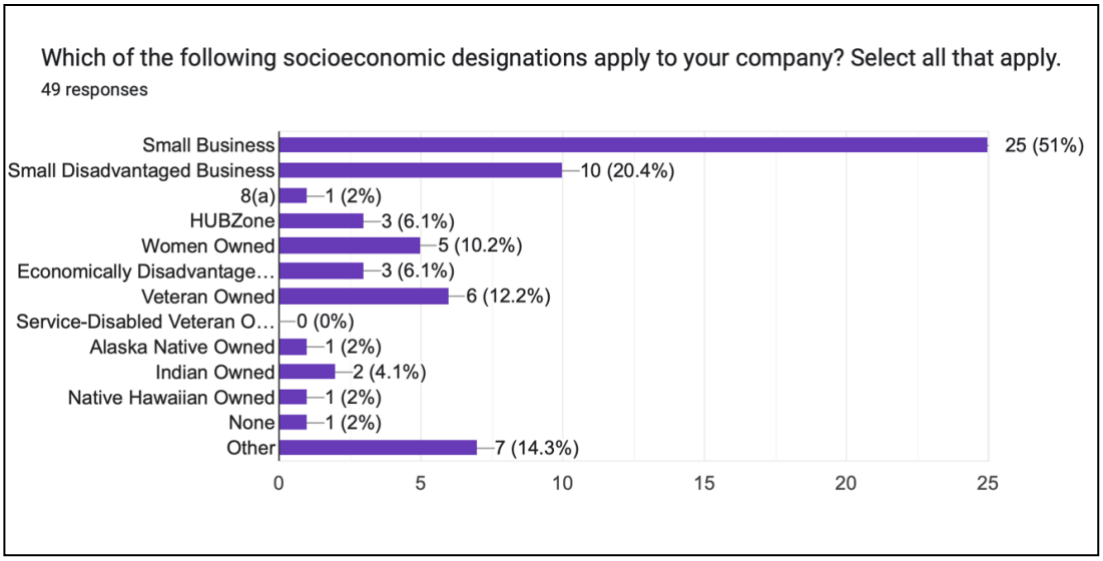

Figure 1: Socioeconomic Designations for Public and Private Contracting Companies.

Proposal writers also worked for companies that fell under designations other than those provided in the survey, which dealt more with sectors than specific socioeconomic categories. These included academic institutions, government agencies, and multinational companies.

Proposal writers were not limited to the U.S. Other geographic areas represented include New Zealand, Pakistan, the Netherlands, India, Croatia, the United Kingdom, Western Australia, and Asia.

About the Proposal Writing Process

The majority of proposal writers (30.6%) reported that their company's proposal writing process was somewhat flexible. A close majority (28.6%) described their company's process as neither rigid nor flexible. Of the remaining proposal writers, 16.3% described the process as somewhat rigid, 12.2% described the process as very rigid, and another 12.2% described the process as very flexible.

In terms of repeatable processes, 80.9% of respondents stated that their company utilized a proposal writing process with clearly defined steps, although none mentioned best practices. Primary steps (those that were mentioned by a majority) were delineated into five primary categories: write, review, revise, and submit. Secondary steps (those that were mentioned significantly but not by the majority) included assign, capture, research, and coordinate. Tertiary steps (those that were mentioned by a minority) included gate decisions. Of the respondents that further described the steps involved in their proposal writing process, 100% were responsible for writing, 61.8% performed reviews and handled resulting revisions, and 64.7% were responsible for submission. In terms of secondary steps, 47% performed independent research related to the proposal, 32.3% were only brought in upon assignment and 29.4% were brought in prior to formal assignment for capture planning, and just 23.5% reported collaboration as being part of the formal process. Of those who described collaboration as a step, only two specifically mentioned subject matter experts, although an additional two referenced experts, which could be interpreted

as subject matter experts. Instead, respondents were more likely to reference stakeholders, editors, graphic specialists, advisors, management (project managers, executive personnel, directors, shareholders, CEOs, and other "decision-makers"). Just one proposal writer reported being included in gate decisions.

Building on communication, 91.5% of respondents were able to clearly describe their proposal writing process as either individual-based or collaborative; only 25.6% described the process as collaborative outside of reviews, closely aligned to the percentage that reported collaboration as being part of the formal proposal writing process. Those who described the process as collaborative used keywords such as 'the team,' 'the firm,' 'the group,' 'we,' and were more likely to use terms such as 'peers' and 'colleagues' versus using titles or 'coworkers.' Of the two writers that specifically called their company's approach collaborative, both tied the approach to better proposals: "We prioritize a collaborative approach, bringing together team members with diverse skills and perspectives to ensure that the proposal is well-rounded and effective" and "Our proposal writing process is a comprehensive and collaborative approach that aims to deliver high-quality proposals to our clients."

Unsurprisingly, the most commonly referenced words were 'writing' and 'client,' indicating that the majority of processes are client-focused, even though less than half of respondents specifically mentioned research. When describing the proposal writing process, respondents often mentioned performing research on the client, aligning the proposal with the client's needs, addressing client hot button issues or past problems, and even discussing client risks associated with their approach and mitigation strategies. Respondents said their proposal writing process included understanding "the client's

requirements [and] preferences," generating "a clear understanding of the client's needs," "[describing] the benefits that the proposed plan" will bring to the client, and "[aligning the proposal] with [the client's] business goals and capabilities."

Interestingly, a few proposal writers seemed to be involved with the graphics and finance department during proposal development. One writer described being concerned that the proposal was "visually appealing," while another described reviewing the proposal for both textual and visual "persuasive power." Other writers working with the finance department reported dealing with cost estimations, budgets, fringe benefits, operating expenses, invoicing, and finance models. Additionally, although 29.4% reported being brought in prior to formal assignment for capture planning, only one described being involved in business development in great detail: this writer reported monitoring government contracting websites, attending industry conferences, and even personally networking with potential clients.

Professional Affiliations

The majority of proposal writers (38.8%) reported utilizing STC for proposal writing training and/or best practices. Two close majorities (34.7% each) reported using APMP and PMI for these same purposes. Only 10.2% reported using Shipley Associates, and 12.2% reported using organizations not listed. Roughly one-third of respondents (30.6%) reported using no organizations for training and/or best practices. Of those who reported using separate organizations, respondents cited the National Institute of Health Sciences, Competitive Solutions, Inc., and undisclosed online resources. Two reported that they only adhered to their company's internal training and best practices, although one

respondent stated that internal best practices were based, at least in part, on industry best practices set by the professional organizations listed above.

Technology and Resources

The majority of respondents (39.6%) reported that their organization employed two to five proposal writers, including the participant. The next two majorities reported that their organizations employed more than 11 proposal writers (22.9%) and six to 10 proposal writers (20.8%). For 12.5% of respondents, they were the only proposal writer employed by their organization. The remaining participants (4.2%) were unsure how many proposal writers were employed at their organization.

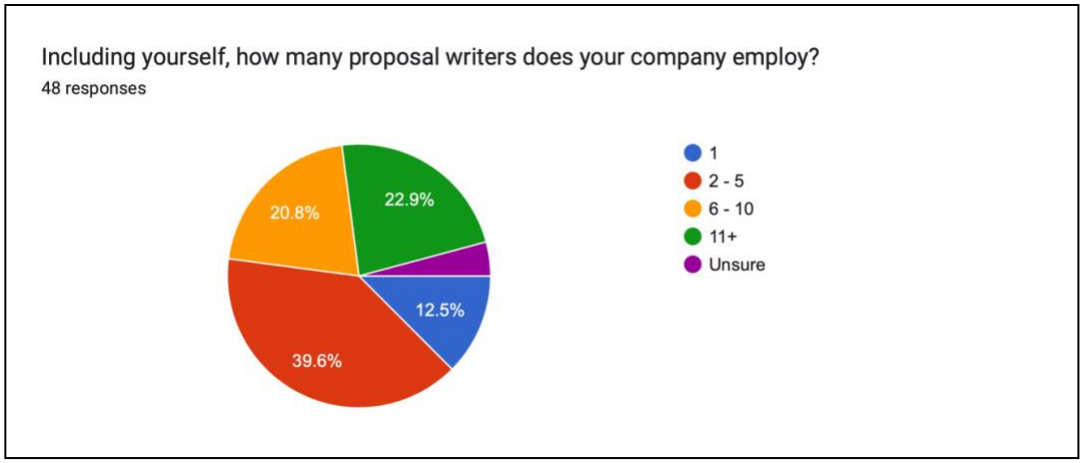

Figure 2: Average Number of Proposal Writers Employed per Company.

The responding proposal writers, when asked how many other proposal writers they worked with on a regular basis, provided answers that aligned with their team sizes: the majority (59.2%) worked regularly with two to five other proposal writers. The next two greatest majorities reported working by themselves (16.3%) and working closely with six to 10 other writers (14.3%). Only 2% reported working with 11+ proposal writers regularly. An additional 8.2% reported working with no other proposal writers; this group can

presumably be added to the majority that reported working by themselves, bringing that percentage to 24.5%.

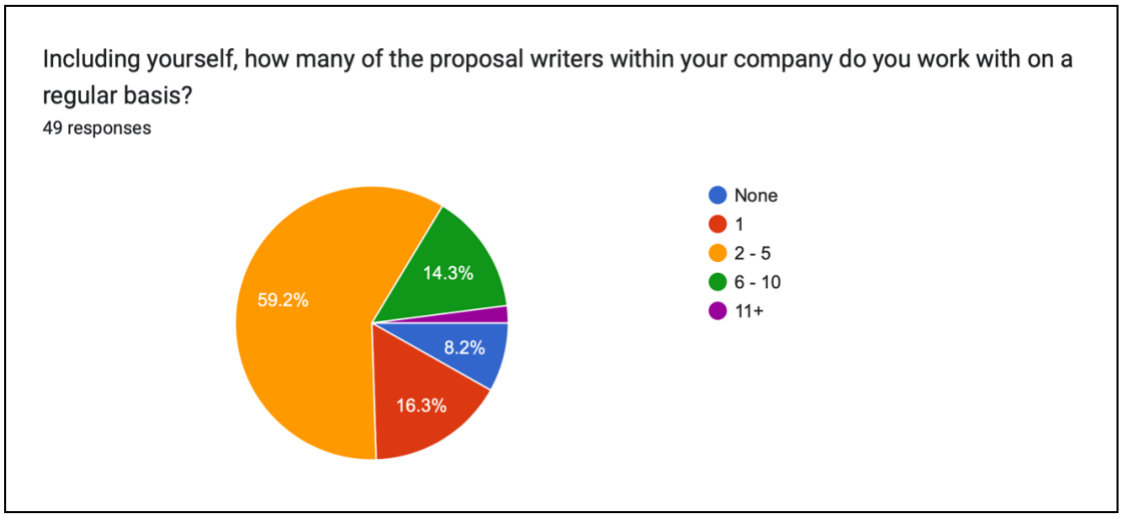

Figure 3: Close Working Relationships between Proposal Writers per Company.

Proposal Writing: Most Effective Components

Respondents gave a variety of answers regarding the most effective components of the proposal writing process, but all answers fell within five categories: relationships (how people work together to complete the proposal), processes (steps in the proposal process; how the proposal is completed), sections (how the proposal is structured; proposal content), components (technical components of the proposal), and approach (how work described in the proposal will be accomplished).

The most commonly cited effective components of the proposal writing process fell within the relationships, components, and approach categories. Within the relationships category, 21.7% of respondents cited client understanding and coordination, 10.9% referenced a collaborative approach, and another 10.9% referenced frequent meetings and discussions across the company as the most effective components of their proposals. These responses were the only three that fell within this category, making the relationships

category the most frequently cited area of proposal effectiveness. As a result of this, it is perhaps unsurprising that three of the most commonly used words in respondent answers are ‘client,’ ‘needs,’ and ‘understanding,’ along with ‘detailed,’ ‘clear,’ and ‘thorough.’ Respondents emphasized that effective proposals not only demonstrate an understanding of client needs, but also integrated client preferences and expectations. There was a focus on ensuring the proposal language was tailored to clients, so that clients understood the outlined approach and how it would achieve client goals. Proposal writers also highlighted that proposals are an opportunity to “build trust and credibility,” “demonstrate commitment to [client] success,” and “build trust and rapport.” Several proposal writers linked accomplishing this to frequent communication and collaboration, both with other proposal writers and company teams in general. Writers said that a healthy environment wherein there is a prevalent “teamwork spirit” where “everyone can talk” and the team is appreciated leads to high quality proposals. Benefits included better goal alignment, more thorough reviews, and “polished” proposals with extra scrutiny on accuracy, coherence, and persuasive power.

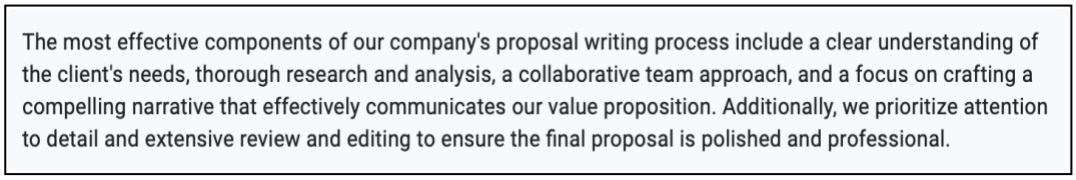

Figure 4: Example of Proposal Writer Feedback on Proposal Writing Process Most Effective Components.

Within the components category, 13% of respondents cited relevant information, 8.7% cited persuasive or compelling narratives, 8.7% referenced attention to detail, and 8.7% referenced visual appeal as the most effective components of the proposal writing process. These responses comprised half of the responses within the components category.

‘Compelling,’ specifically, was another word commonly used in respondent answers, in addition to ‘strong.’ In their responses, proposal writers emphasized that brevity was closely tied to relevancy and persuasion. Writers described their most effective proposals as “clearly articulate” with “clear and concise messaging,” with one respondent summarizing: “We don’t write irrelevant details[; just] keep it to the point.” Such succinctness contributed to creating “compelling narratives” that also “effectively communicate,” according to another respondent. Effective communication was also closely tied to the balance between text and visuals in proposals, as writers described that the overall effect should be “visually appealing [but] easy to read” and that “graphics and visual aids [including charts, graphs, or images [should] highlight key data or concepts.” Writers reported working to ensure proposals were “eye-catching” and “visually appealing and easy to read,” while others emphasized making their work “cleanly presented” with “professional formatting and presentation.”

Within the approach category, 13% cited finance as the most effective components of the proposal writing process, including costs, profits, prices, budgets, and fund allocation. ‘Value’ was the most commonly used word associated with these responses. Finance was also closely linked to clients: one respondent said that their profit discussions were always tailored to show “what would the company get out of this?” Respondents reported that accurate finances “helps the client to understand” the proposal and can be integral to the client “[making] an informed decision about whether to proceed” with a bid.

The remainder of the responses that fell within the approach and components categories and all responses that fell within the processes and sections categories were split

between responses that were cited three times, two times, and just once, as shown in the exhibit below.

	Cited 3x (6.5%)	Cited 2x (4.3%)	Cited 1x (2.2%)
Processes	Research	Timely Submission	Proposal Analysis
		Reviewing	Quality Review/ Check
		Editing	Needs Analysis
		Writing	Proposal Audit
Sections	Scope	Management Solutions/ Approach	Outcomes
	Value Proposition	Technical Solutions/ Approach	Closing Statement
	Goals/ Objectives	Problem Statement	Action Plan
	Project Plan	Projections/ Timeline	Title
	Introduction/ Executive Summary	Proposed Personnel/ Staffing	Guide
Components	Structure/ Framework		Data/ Analysis
	Content		
Approach		Resources/ Resource Use	Product Delivery
		Flexibility	

Interestingly, one respondent said that every part of their company's current proposal writing process was effective.

Proposal Writing: Least Effective Components

Regarding the least effective components of the proposal writing process, over half of respondents (55%) gave an answer that related to either communication (27.5%) or the writing process (27.5%). For communication, some answers related to issues with external communication (i.e., between the proposal writer or proposal team and other individuals within of the company) but the majority were related to issues with internal communication (i.e., between the proposal writer and the proposal team). Examples of issues with external communication included interruptions from "a large number of people," colleagues who

"communication too little and take too long to solve problems," "unnecessary involvement of different people," "poor communication with stakeholders," and having to "explain a lot of stuff to non-experts or irrelevant [people.]" Examples of issues with internal communication included a "disjointed or uncoordinated team approach," "failure to effectively communicate," "miscommunication" among the team, too much "interdependency [among the] team," and a lack of discussions and effective decision-making.

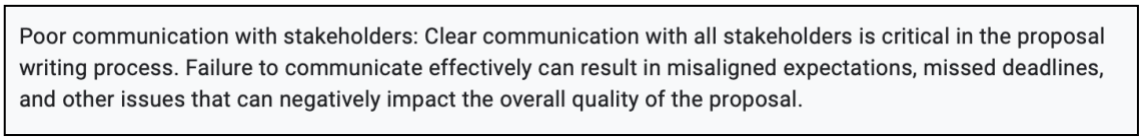

Figure 5: Example of Proposal Writer Feedback On Proposal Writing Process Least Effective Components.

For issues relating to the writing process, proposal writers primarily reported insufficiencies: "inadequate research," "insufficient research and analysis," "inadequate editing and reviewing," "insufficient quality control," and even a "lack of creativity and innovation." Overall, proposal writers reported that this created an "incomplete product" despite submissions being on time. These issues were not limited to one specific step of the proposal writing process. One respondent said that the proposal writing process overall was slow, while another similarly cited the writing timelines as insufficient. Two respondents said that the writing strategy was flawed and inefficient. Only one proposal writer reported issues related to the writing process that were not internal to the company; they stated that it was "difficult to find information" on the solicitation, which led to lackluster proposal responses.

There were also a number of issues (29.8%) relating to the writing itself for proposals. These included the writing style, how the proposal was written and organized,

the persuasive elements of the proposal, the details included in the proposal, and awkward language use. There were also concerns related to “complex language” and “overreliance on jargon and technical language.” Additionally, proposal writers took issue with unclear or ambiguous titles, value statements, project scopes, and technical approaches, which in turn created drafts that were overall unclear or ambiguous. One respondent said that the writing was not tailored enough for individual clients.

Two responses related directly to the financial components of proposals. Respondents said the financial statements were inadequate and that several of their proposals had “inaccurate and non-transparent pricing.” Two responses also related directly to risk, including risk decisions (i.e., submitting proposals for high-risk contract work). Interestingly, another two respondents also cited the primary issues not from employees, but for employees: respondents said that they did not have enough access to supporting resources and that “greater benefits” were needed for proposal writers.

Four respondents said that there were no parts of their proposal writing process that were ineffective.

Common Challenges

The most commonly encountered challenges that proposal writers reported were access to supporting resources (46.9%), closely followed by direction/ instructions (44.9%) and time/ schedule (42.9%). The least commonly encountered challenges were peers/ coworkers (14.3%), organization (16.3%), and bandwidth/ availability (22.4%). Additional challenges reported were information (36.7%), management/ supervision (32.7%), and communication (26.5%).

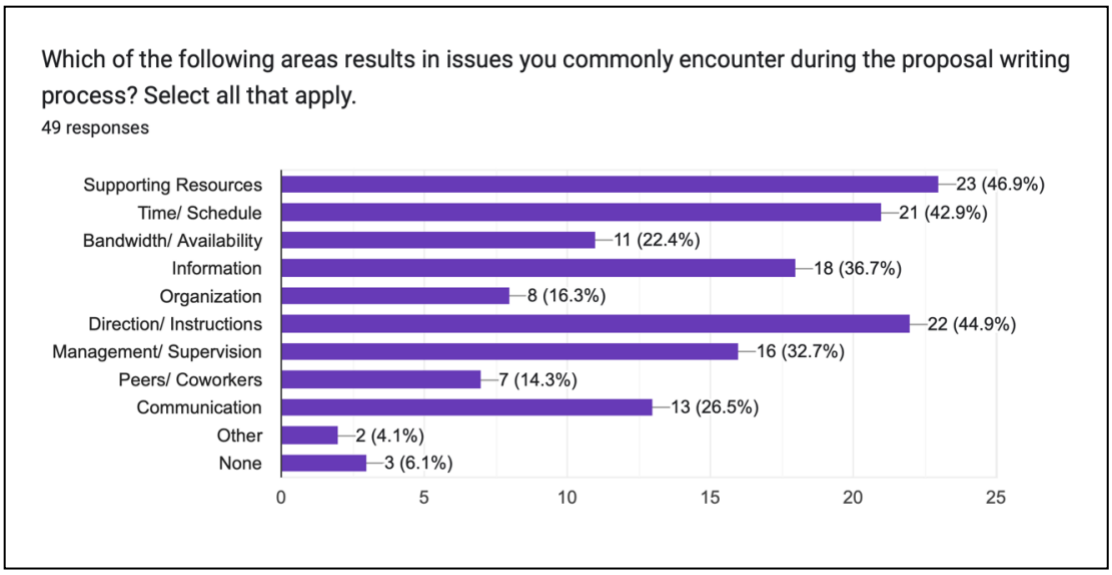

Figure 6: Issues Commonly Encountered During the Proposal Writing Process.

Two proposal writers reported issues under the 'other' category, which were as follows: team interdependency (which led to role ambiguity, lack of quality control, and lack of conflict resolution) and proposal compliancy issues (which led to legal repercussions, time delays, and additional costs).

Three proposal writers (6.1% of respondents) reported encountering no issues in the proposal writing process, although this slightly contradicts data related to the frequency of issues encountered during the proposal writing process (see Figure 5). Only two proposal writers reported never encountering issues. On the opposite end of the scale, only one writer reported always encountering issues. Of those remaining, the majority (55.1%) reported often encountering issues; 22.4% reported almost always encountering issues, and 16.3% reported almost never encountering issues.

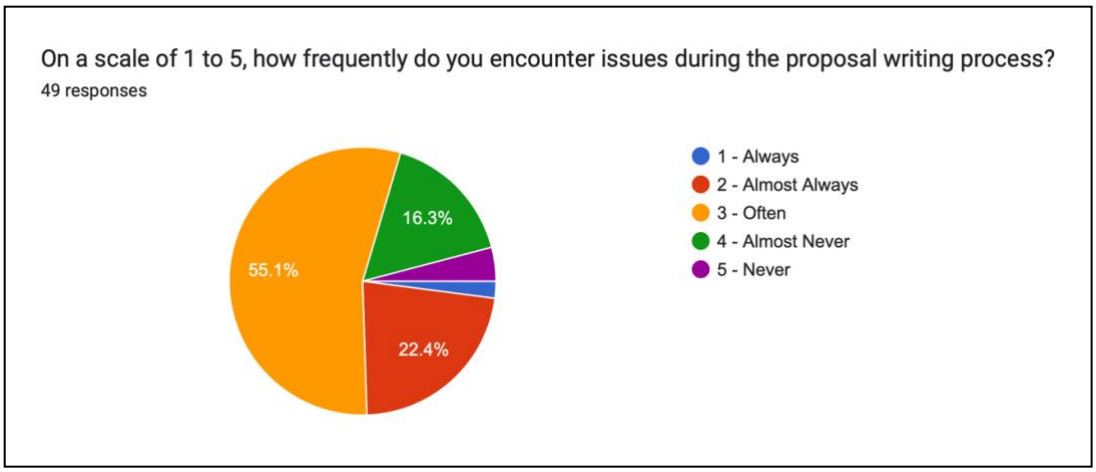

Figure 7: Frequency of Issues Encountered during the Proposal Writing Process.

Related to this, answers were more evenly split regarding the consistency of issues encountered during the proposal writing process. The majority (39.6%) reported issues during the proposal writing process being sometimes consistent, while 31.3% reported that the issues were reliably consistent and 25% reported that the issues were inconsistent. Two proposal writers (4.2%) reported that they were unsure if issues were consistent or not.

Methods to Address Challenges

Transitioning to how proposal writers addressed issues, communication was again the most commonly cited resolution method, with 37.8% of respondents stating that either escalation or increased communication helped resolve challenges. Examples of escalating issues included assigned a dedicated proposal manager, seeking feedback from outside parties (such as "trusted" colleagues, mentors, and even the client), enhancing communication with managers, talking to someone higher in command, having discussions with CEOs and the development team, and involving top management. In terms of increased communication, proposal writers cited doing so within the proposal teams themselves, but also increasing communication between the proposal team and clients. In

terms of communication within proposal teams, writers said that issues and challenges were resolved by circling back to ideas from colleagues, supporting inter-team relationships, working together to solve problems, encouraging a consistent team spirit, and even employing mediation techniques. One proposal writer said that increased communication resolved issues, but only after the proposal writing process switched to individual assignments versus collective assignments to avoid unequitable workshares.

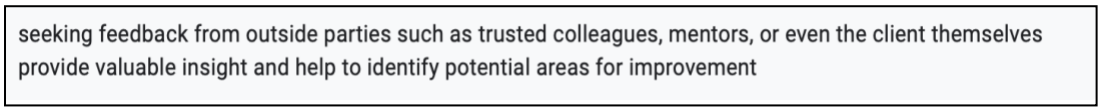

Figure 8: Example of Proposal Writer Feedback on Mitigating Proposal Writing Process Least Effective Components.

Related to communication, 13.3% of proposal writers also stated that using more precise or different language helped resolve issues. For example, one respondent said that issues were resolved by rewording and asking "concise and smaller" questions, which reflected four other respondents who said that "concise words," writing in "simple English," writing more "logical content," and ensuring proposals weren't too long resolved issues. Another respondent said that the team created more effective proposals after strengthening their knowledge of writing.

Another 11.1% of respondents said that additional research helped resolve issues, while 8.9% reported instituting additional reviews. Additional research included increasing both the quantity of research ("conducting additional research," collecting more "extensive" information) and the quality of research ("conducting [more] thorough research and analysis," "[conducting more] comprehensive in-depth research"). One respondent also reported shifting the nature of the research to "collect [more] theoretical

and persuasive (convincing) information." Additional reviews included peer reviews to incorporate feedback and more comprehensive proposal reviews.

Incorporating more or better quality visual components was also cited by 8.9% of respondents as a way to resolve issues. Respondents said that "encouraging innovation and creativity" and working with peers "full of creative ideas" helped overcome challenges. Increased visual components included graphics, tables, and visual aids.

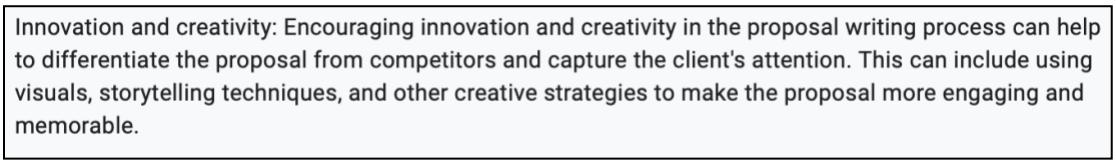

Figure 9: Example of Proposal Writer Feedback on Mitigating Proposal Writing Process Least Effective Components.

Software was cited by two respondents as helping overcome challenges. This included "[utilizing] project management software" and other programs tailored for more effective proposal writing. Proposal writers provided examples of useful software functions, including "[allowing] for collaboration and communication among team members," "[tracking] progress and milestones," and "[providing] real time updates" on proposal status.

Another two respondents cited better addressing risks related to proposals— "you must have risk awareness and risk response measures when making proposals" and carefully consider "risk subjects"— and yet another two cited increasing trainings, including "[conducting] training or workshops" and providing additional "training and guidance" to writers.

Four respondents said that they had identified no reliable methods for resolving issues or inefficiencies in the proposal writing process.

A majority of participants (71.4%) reported that they addressed issues in the proposal writing process with a supervisor, manager, or similar personnel, reinforcing the tie between internal communication issue resolution and escalation. Interestingly, 22.4% of participants said that this question was 'not applicable' to them. Only three respondents (6.1%) said that they had not addressed issues with management or similar personnel, the reasons being that it would take too much time to implement process changes and that the problems were minor enough to work through and forget.

Of the respondents who had discussions about issues with management or similar personnel and were willing to describe these discussions, the majority (82.4%) reported initiating that discussion. However, one participant reported that advisors "sometimes" also initiated the discussions. For the remaining participants, either management or similar personnel initiated or it was a mutual discussion wherein no one party initiated the discussion first. For those who had a discussion with management or similar personnel, the majority (68.8%) reported that it clearly helped. However, one participant noted that it only partially helped (and that long-term issues were only partially addressed), and another participant said that "nothing was done" immediately despite the conversation. Two additional participants noted caveats regarding the extent of the helpfulness: one said that discussions helped "most of the time," while the other said that discussions helped "a bit." Of those who reported that the discussion was helpful, the majority (63.6%) reported that the help was formal. One respondent who said discussions were helpful revealed that, beyond being held informally, proposal writers at their organization also had to initiate such discussions "privately" during their "free time."

Reflecting communication with management, a slightly larger portion (75.5%) reported having discussions about issues with other proposal writers or peers/ coworkers. The majority of remaining respondents (16.3%) reported the question as being not applicable, and just four respondents (8.2%) reported not discussing issues at all with peers/ coworkers. Of those who did not discuss issues with peers, each provided a distinct reason: the proposal writer worked individually (and so had no close coworkers or peers), the proposal writer did not feel it was necessary or appropriate, the issues were being caused by interference from other proposal writers, and the proposal writer had directly begun solving the problem on their own (and therefore did not need feedback or help).

CHAPTER 5

DISCUSSION

Best Practices and Repeatable Processes

Although APMP reported that 70% of respondents had best practices and 66% had a documented proposal process, 80.9% of survey respondents reported having a repeatable proposal writing process with distinct steps. And although roughly one-third of respondents reported using professional organizations for best practices and training (38.8% for STC, 34.7% for APMP, and 34.7% for PMI; only 10.2% reported using Shipley Associates), no respondents specifically mentioned these organizations when discussing the steps of their company's proposal writing process, efficiencies within the process, or inefficiencies within the process. For proposal writers whose companies utilize these organizations, this could mean that industry best practices are so ingrained into the proposal writing process that writers are not aware of industry best practices versus internal best practices. Alternatively, this could mean that the industry best practices are presented as internal best practices, that the company is aware of industry best practices and chooses not to implement them, or that the training and information on best practices is provided to individuals other than the proposal writers. Yet another option is that the proposal writers or other team members undergo training and receive information on industry best practices, but that these are done more for show than substantive change. For proposal writers those companies do not use professional organizations for industry best practices or training, it could be that the contracting companies are unaware of these organizations; that these companies cannot afford to utilize these organizations; or that the companies deliberately

choose not to implement industry best practices and training from such organizations, regardless of cost.

Technology and Resources

APMP and Loopio reported on access to technology and usage, respectively; the former found that usefulness of technology was hindered by maintenance, and the latter found that less than half of respondents used RFP software in 2023, a significant downtrend from the 69% in 2022 and 2021. This study did not ask participants about technology or RFP software use, but two respondents did note that project management software helped overcome challenges. Although project management software offers expanded functions beyond RFP-specific software, the respondents did mention that the project management software led to more effective proposal writing. Respondents to the Loopio study reported the top benefits as being content storage and maintenance improvement, time savings, and task automation. However, proposal writers who participated in this study reported using the project management software for and the primary benefits as being increased communication/ collaboration, progress and milestone tracking, and real-time proposal updates. These later two components can arguably be viewed as offsets of increased communication/ collaboration.

In terms of human resources (i.e., fellow proposal writers and other team members), Loopio reported the average RFP team was seven or eight people and the average number of collaborators ranged from seven to 10 individuals. The majority of respondents for this study reported that their company employed two to five proposal writers; when asked how many other proposal writers they worked with on a regular basis, the majority again reported that they worked with two to five other writers. While neither Loopio nor this

study examined the specific makeup of RFP teams in terms of job titles (i.e., how many proposal writers were employed, how many proposal managers were involved, etc.), these results, when taken together, could indicate that the majority of RFP team are comprised of proposal writers. If this is true, it reinforces the need for additional research into the proposal writing process, its efficiencies, and its inefficiencies as understood by proposal writers.

Clarification into the specific makeup of RFP teams would also provide insight for this study; nearly one-third of respondents for this study indicated that communication was one of the least effective components of the proposal writing process, specifically internal communication between the proposal writer and the proposal team. However, the way in which internal communication and external communication are defined for this study may not accurately reflect the way Loopio defined RFP teams. This study defined external communication as being between the proposal writer or team and other individuals within the company, such as stakeholders and "non-experts." Notably, SMEs were not cited as being involved in the communication issues, although generalized terms such as "colleagues," "peers," and "the team" were used, which could have included SMEs. If SMEs are included in the RFP team, then the greatest challenge that Loopio reported on (collaboration with SMEs in 2022 and 2021) and the greatest inefficiency this study found (internal communication) could be related. However, if SMEs are not included in the RFP team, it could indicate that while a broad range of individuals in the proposal writing process struggle to collaborate with SMEs (as reported by Loopio), proposal writers struggle to collaborate with a greater number of individuals outside of their team, including but certainly not limited to SMEs (as found in this study).

The definition of RFP teams could also provide insight into the answers provided by this study's respondents in terms of issues with external communication versus internal communication. For example, issues with external communication included colleagues who "communication too little and take too long to solve problems" and "unnecessary involvement of different people." SMEs could certainly fall into the former category, but are unlikely to fall into the latter since they provide much-needed insight for proposals into the technical components of specific subjects. A dual approach is therefore needed here: to identify the entire spectrum of individuals whose communication causes delays, but also to identify whose involvement in the proposal writing process hinders more than helps. Transitioning to internal communication, "disjointed" team structures, too much "interdependency," and a general lack of effective communication were all examples of cited issues. If SMEs are included in proposal teams, it is possible but unlikely that they are the sole source of these issues. Again, a more in-depth investigation is needed to identify all individuals who are causing communication issues. Understanding the team makeup and the relationships both within the RFP team and between the RFP team and other individuals involved in the proposal writing process is central to creating successful mitigation strategies to resolve these communication issues.

Common Challenges

Besides collaboration with SMEs, Loopio reported that the primary challenges were 'meeting deadlines and dealing with delays' and 'finding answers,' which included variants such as 'finding up-to-date, accurate answers,' 'finding accurate answers quickly,' and 'choosing the best answer from a group/pool.' Cohn and Reznick's study reported the top challenges as a lack of communication, unrealistic timelines, and a lack of work scope

clarity. While over 40% of respondents for this study agreed that time/ schedule was a primary challenge, the other most reported challenges were access to supporting resources and direction/ instructions. Interestingly, peers/ coworkers were one of the least reported challenges, and management/ supervision and communication were also not frequently cited, despite communication being a central theme to inefficiencies in the proposal writing process, as discussed in the section above. The differences in challenges may be due to the different roles the respondents fill in the proposal writing process, although the extent to which a specific position engages in research to find 'answers' varies from contracting company to contracting company. The differences in challenges may also be attributed to the specific type of proposal writer that engaged in this study; many respondents were freelance proposal writers versus writers employed by public or private contracting agencies, which could mean less interaction with coworkers or management but more interaction and communication with clients. The differences could also be attributed to industries each RFP team or proposal writer worked in; some industries require a greater deal of research and/or client communication than others.

Depending on the interpretation of 'finding answers,' this challenge may have also been reflected by proposal writers. Although the definition of 'answers' was not provided by Loopio, broadening 'answers' to 'information' in general aligns this challenge with common issues that over one-third of proposal writers reported experiencing. Additionally, when discussing the least effective components of the proposal writing process, one proposal writer reported that it was "difficult to find information" related to the solicitation. Although 'information' was not reported as one of the most commonly encountered issues or inefficiencies in the writing process, its presence across both studies marks it as a point

of significance that may be worth future research. As noted above, research may vary by position depending on the contracting company, employment status (i.e., company employee or freelancer), or supported industries.

Issues and challenges associated with answers, information, and time could also relate to issues with the writing process. A majority of respondents reported issues with the writing process when discussing the least effective components of proposal writing. Respondents specifically mentioned "inadequate research" and "insufficient research and analysis." This may also be supported by data from respondents on the most effective components of the proposal writing process, as 'process' as one of the lowest-cited components of effective proposal writing processes. 'Process' was defined as steps in the proposal process (i.e., how the proposal is completed). Although this study did not expressly exclude the time period before a writer received a proposal, limiting respondents to proposal writers makes it likely that respondents considered the proposal writing process as the point of proposal assignation to submission. Regardless, only three respondents cited research as an effective component of the proposal writing process; even fewer reported research, writing, editing, and timely submissions as effective. Just one respondent mentioned a needs analysis as effective. If underlying issues or challenges related with information are already affecting RFP team members before a proposal is assigned, these issues would only be compounded after the point of assignation.

Of note is that time-related challenges remained a primary issues across all studies, including this one, despite the differences in participants. Deadlines, timelines, and schedules remained a consistent, high-ranking (i.e., highly encountered and reported) challenge across job titles, employment status, socioeconomic categories, and supported

industries. This commonality, despite not being frequently cited by proposal writers when discussing process efficiencies and inefficiencies, clearly still remained at the forefront of the minds of both proposal writers and other RFP team members. In terms of expanding on this issue, only two respondents provided more information: one said that the proposal writing process overall was slow and the other said that the provided timelines for proposal writing were too short. The latter response is more relevant to time-related challenges.

Given the time-related issues reported by participants not working as proposal writers, it is possible that there are time constraints that negatively affect RFP team members before proposal writers are given an assignment. Prior to assigning a solicitation response, a great deal of research goes into bid decisions and research. As a result, this issue may be related to challenges regarding 'finding answers' and 'information.' Some of these issues may be related to bid decisions and research prior to an RFP being formally released, while others may be related to bid decisions and research after an RFP is formally released. In the case of the latter, the time constraints affecting other RFP team members would also negatively affect proposal writers by decreasing the quality of the information about the client and solicitation provided to the proposal writer to inform the proposal response and decreasing the amount of available time allotted to developing this response for submission. In turn, this could partially explain why the writing process was reported as one of the least effective components of the proposal writing process and why the process itself was so infrequently mentioned when discussing the most effective components of the proposal process.

Despite the potential relationship between answers/ information, time, and issues within the proposal writing process, the data showed no definitive links between these

three subjects. Additionally, while there may be a correlation, there is presently no evidence of direct causation. As mentioned throughout this section, there are a number of variables that may affect respondent answers and need to be controlled for prior to categorically stating that each of these three subjects is related and that a comprehensive mitigation strategy could address the underlying causes of all. Therefore, while the data supports that these subjects may be related, it cannot be interpreted as proving it.

CHAPTER 6

FURTHER RESEARCH

As noted in the section above, there may be links between the challenges cited by RFP team members in research from professional industry organizations such as APMP and Loopio and the issues related to most and least effective components of the proposal writing process reported by proposal writers for this study. However, additional research with a greater population sample is needed to confirm and expand on the feedback provided in this survey. This survey was limited to proposal writers to account for the lack of representation in research to date. However, as a result, the data from this survey cannot be abstracted to data from research that includes participants beyond proposal writers to include all members of RFP teams, and vice versa. Additionally, the geographic dispersion of the sample, while insightful for examining proposal writing process efficiencies and inefficiencies across geographical boundaries, introduces more variables into the process that this study does not accommodate for, including but not limited to cultural differences. The sample is also greatly skewed toward public and freelancer organizations, with little representation from proposal writers who work for or are employed by government organizations. Expanding the sample size, both in terms of job titles, geographic dispersion, and representation of government organizations would also allow for more definitive data on the differences between government and non-government contracting, the challenges and issues that exist across the contracting sphere, and the most and least effective components of the proposal writing process across contracting.

Similarly, greater research is needed on proposal writing process for contracting companies who use professional organizations such as APMP and STC versus companies

who choose not to. Since a great deal of the current research is conducted by or affiliated with these companies, there is an inherent skew in terms of best practices and current processes for proposal writing toward the practices and processes endorsed by these organizations. Research conducted independently of these organizations that includes both contracting companies who do use professional organizations and who don't would allow for an analysis of the similarities (i.e., overlap) and the differences in practices and process. This analysis could provide insight into inefficiencies that exist across writing processes regardless of use of industry best practices. Such research could also provide insight into efficiencies specific to utilizing industry best practices, and efficiencies specific to any companies that purposefully do not utilize industry best practices.

For future research that utilizes surveys, a mixed methods approach that includes interviews or utilizing another qualitative component would help mitigate the limitations of quantitative research. Though including open-ended/ free answer questions in the survey for this research provided additional insight into the questions and allowed for some spontaneous data discovery, this discovery was extremely limited and still guided by the preceding questions. A mixed methods approach that equally utilizes quantitative and qualitative methods would mitigate these limitations and generate a greater depth of data. Future studies should also consider purely qualitative techniques, with a focus on interviews. While quantitative and mixed methods research provides useful insight, they both include topics that are primarily steered by pre-set or pre-conceived questions. Allowing proposal writers greater leeway to discuss issues, challenges, and most and least effective writing components would allow cultivate richer and more spontaneous data. This would also give proposal writers and RFP team members the chance to explore the

connection between these three subjects on their own terms, and state whether or not each participant believes there is a connection, and if so, in what capacity.

Future studies on this topic that include proposal writers for government organizations should allot significant time toward recruitment. A potential recruitment avenue that may alleviate concerns regarding confidentiality and employer permission would be for the researcher to directly contact government contracting organizations and ask to collaborate with proposal writers on surveys, interviews, or other research methods. Researchers may need to utilize additional precautions, such as non-disclosures or other legally binding documentation, to reassure government contracting organizations that all sensitive unclassified information, classified information, or confidential information will be kept out of the research and that no identifying information will be used in regard to the proposal writers. Researchers may need to directly coordinate with each government contracting organization's legal department to clearly identify which topics proposal writers may discuss.

CHAPTER 7

CONCLUSION

Significant further research is needed that focuses solely on proposal writers and how the feedback proposal writers provide differs from that of other individuals involved in the proposal writing process for federal and private contracting companies. Previous research and literature to date has focused holistically on the proposal writing process and sought to represent all individuals involved in this process. However, while valuable, the feedback provided by these reports and literature is contradictory to the information gained from proposal writers during the course of this research.

Proposal writers reported that communication and collaboration were the most significant factors related to the most and least effective components of proposal writing for contracting companies. This remained the same across differences in geographical location, socioeconomic designations, and company/ proposal team makeup. However, despite being the most significant factors, communication and collaboration were not the most frequent issues encountered by proposal writers. Instead, proposal writers said that they most frequently encountered issues related to supporting resources, time/ schedule, and directions/ instructions. One-fourth of proposal writers also noted that issues were not consistent, despite being primarily related to these three areas, and a majority reported that conversations about issues were initiated by proposal writers.

Additional research is needed to determine if communication and collaboration remain the most significant concern for proposal writers, in addition to what other factors may influence the most and least effective components of the proposal writing process. Further research would also be beneficial to compare feedback from public and private

sector proposal writers on the proposal writing process, its efficiencies and inefficiencies, and most significant or most frequently encountered problems.

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APPENDIX A

SURVEY QUESTIONS

1. [Please state your first name or first initial of your first name.
    a. [Free answer]
2. Where is your proposal writing company geographically located?
    a. [Free answer]
3. Which of the following socioeconomic designations apply to your company? Select all that apply.
    a. Small Business
    b. Small Disadvantaged Business
    c. 8(a)
    d. HUBZone
    e. Women Owned
    f. Economically Disadvantaged Women Owned
    g. Veteran Owned
    h. Service-Disabled Veteran Owned
    i. Alaska Native Owned
    j. Indian-Owned
    k. Native Hawaiian Owned
    l. None
    m. Other
4. If you answered ‘Other’ in the previous question, please explain below.
    a. [Free answer]
5. Including yourself, how many proposal writers does your company employ?
    a. 1

b. 2 – 5

c. 5 – 10

d. 11+

e. Unsure

6. Not including yourself, how many of the proposal writers within your company do you work with on a regular basis?

    a. 0

    b. 1

    c. 2 – 5

    d. 5 – 10

    e. 11+

7. Describe your company's proposal writing process, from the point of assignation to yourself or a peer through final submission.

    a. [Free answer]

8. On a scale of 1 to 5, how rigid or flexible is your company's proposal writing process?

    a. 1 – Very Rigid

    b. 2 – Somewhat Rigid

    c. 3 – Neither Rigid Nor Flexible

    d. 4 – Somewhat Flexible

    e. 5 – Very Flexible

9. What are the most effective components of your company's proposal writing process?

a. [Free answer]

10. What are the least effective components of your company's proposal writing process?
    a. [Free answer]
11. Which of the following areas result in issues you commonly encounter during the proposal writing process? Select all that apply.
    a. Supporting Resources
    b. Time/ Schedule
    c. Bandwidth/ Availability
    d. Information
    e. Organization
    f. Direction/ Instructions
    g. Management/ Supervision
    h. Peers/ Co-Workers
    i. Communication
    j. Other
    k. None
12. If you answered 'Other' in the previous question, please explain below.
    a. [Free answer]
13. On a scale of 1 to 5, how frequently do you encounter issues during the proposal writing process?
    a. 1 – Always
    b. 2 – Almost Always

c. 3 – Often

d. 4 – Almost Never

e. 5 – Never

14. Are the issues you encounter during the proposal writing process consistent?

    a. Yes

    b. No

    c. Sometimes

    d. Unsure

15. What methods, if any, have you found to be effective in addressing proposal writing issues, either those identified in earlier questions or additional issues?

    a. [Free answer]

16. Have you addressed the issues you encounter during the proposal writing process with a supervisor, manager, or similar personnel?

    a. Yes

    b. No

    c. Not Applicable

17. If you answered 'No' in the previous question, please explain below.

    a. [Free answer]

18. If you answered 'Yes' in the previous question, please describe under what circumstances you had this discussion, including who initiated the discussion and whether it was held formally or informally.

    a. [Free answer]

19. Have you discussed the issues you encounter during the proposal writing process with a fellow proposal writer or other peer/ co-worker?
    a. Yes
    b. No
    c. Not Applicable
20. If you answered 'No' in the previous question, please explain below.
    a. [Free answer]
21. Which of the following organizations do you or your company utilize for proposal writing training or best practices? Select all that apply.
    a. Shipley Associates
    b. Association of Proposal Management Professionals
    c. Society for Technical Communication
    d. Project Management Institute
    e. Other
    f. None
22. If you answered 'Other' in the previous question, please explain below.
    a. [Free answer]
23. If you selected one of the organizations listed in a previous question, please expand on what aspects of these trainings or organizations are utilized during your company's proposal writing process.
    a. [Free answer]

24. Would you be willing to participate in a follow-up interview to expand on these and other topics related to proposal writing? Participants will be entered into another drawing for a $50 Amazon gift card.
    a. Yes
    b. No
25. If you answered ‘Yes’ in the previous question, please provide an email address or other contact method by which the researcher can contact you to arrange a follow-up interview.
    a. [Free answer]59

APPENDIX B

IRB EXEMPTION

ASU Knowledge Enterprise Development

EXEMPTION GRANTED

Andrew Mara
CISA: Technical Writing and Communication (TWC)
-
Andrew.F.Mara@asu.edu

Dear Andrew Mara:

On 2/23/2023 the ASU IRB reviewed the following protocol:

Type of Review:	Initial Study
Title:	Proposal Writing Best Practices
Investigator:	Andrew Mara
IRB ID:	STUDY00017365
Funding:	None
Grant Title:	None
Grant ID:	None
Documents Reviewed:	• M.Rast_Interview Consent Form Script.pdf, Category: Consent Form; • M.Rast_Interview_Questions.pdf, Category: Measures (Survey questions/Interview questions /interview guides/focus group questions); • M.Rast_IRB Protocol Final.docx, Category: IRB Protocol; • M.Rast_Recruitment_Script.pdf, Category: Recruitment Materials; • M.Rast_Survey Consent Form Script.pdf, Category: Consent Form; • M.Rast_Survey Recruitment Script.pdf, Category: Recruitment Materials; • M.Rast_Survey_Questions.pdf, Category: Measures (Survey questions/Interview questions /interview guides/focus group questions);

The IRB determined that the protocol is considered exempt pursuant to Federal Regulations 45CFR46 (2)(ii) Tests, surveys, interviews, or observation (low risk) on 2/17/2023.

In conducting this protocol you are required to follow the requirements listed in the INVESTIGATOR MANUAL (HRP-103).

If any changes are made to the study, the IRB must be notified at research.integrity@asu.edu to determine if additional reviews/approvals are required. Changes may include but not limited to revisions to data collection, survey and/or interview questions, and vulnerable populations, etc.

Sincerely,

IRB Administrator

cc:

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