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Book Facts

- © 2003 by J. Ross Publishing
- ISBN: 1-932159-04-5
- # Pages: 333

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Winning E-Learning Proposals

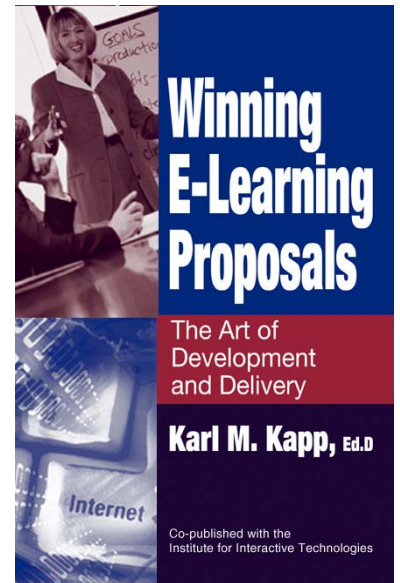
By Karl M. Kapp, Ed.D.

Overview

Winning E-Learning Proposals provides a step-by-step methodology for creating, writing and presenting effective e-learning proposals.

The 18 chapters in *Winning E-Learning Proposals* provide guidance, advice, and council on how to develop a winning proposal. The book highlights strategies that have helped companies make millions of dollars. It includes vignettes from well known industry vendors and large client organizations using e-learning. These vignettes provide valuable insight into the process of securing e-learning business.

This book is co-published by the well known academic, e-learning think tank, the Institute for Interactive Technologies at Bloomsburg University in Bloomsburg, PA.



The E-Learning Business Acquisition Process

The E-Learning Business Acquisition Process (E-BAP) outlined in the book consists of 10 steps which are detailed throughout the work. The steps are:

1. Receive the RFP.
2. Analyze the RFP.
3. Ask Questions to Clarify the Problem (Bidder's Conference).
4. Conceptualize the Solution.
5. Write Proposed Solution.
6. Proposal is Accepted or Rejected.
7. Gather Work Samples/Develop Working Prototype.
8. Sales Presentation to Client.
9. Client Accepts or Rejects the Solution.
10. Establish Working Agreement (Statement of Work).

Understanding each of these steps and the role that both the vendor and

client play in the process helps the reader understand what needs to be done to make the E-BAP successful for their organization.

Each step is a potential opportunity or pitfall depending upon how you handle the situation.

For example, a careful analysis of the RFP to determine the specific business need of the client, can be the difference between winning the e-learning business and losing.

Writing an Effective Proposal

First and foremost, a proposal is a written document. Without good writing, the proposal cannot possibly succeed.

In addition to the requirements of having an exciting, interesting and cost effective solution, the proposal needs to have good sentence structure, active language, effective paragraph design and a logical thread.

Each section must support the capture strategy and aid in convincing the client to purchase your solution. Every word, sentence and paragraph needs to add value.

Good writing consists of a number of elements that must be combined to achieve success. These elements start with the appropriate format.

Determine what format is required for margins, fonts and page requirements to write effectively.

Next, your document must use the language of business. It must be concise to the point and not filled with flowery sentences or superfluous adjectives.

Remember these key points:

- Avoid complexity and unnecessary words.
- Write in the active voice at the appropriate level for the reader.
- Address a business need.
- Speak the client's language.
- Write to persuade, not to impress.
- Add redundancy to ensure understanding. Clients do not read a proposal cover-to-cover.
- Highlight what is of interest to your readers and the strengths of your organization.

"I have learned over the years that failure to win business is mostly due to lack of adequate preparation."
-- Robert Delamontagne
Chairman and Founder,
EduNeering, Inc.

Develop a Proposal Theme

The theme of the proposal is the thread that holds the entire document together. It is like a movie plot.

Although different, seemingly unrelated items may happen in a movie, in the end, the plot ties everything together (at least in good movies). This is the purpose of a proposal theme.

Winning proposals weave a theme throughout holding all the sections together.

An example of an effective theme would be the idea that the client has an e-learning "puzzle" and you hold the missing puzzle piece. The puzzle piece theme would be reflected in both graphic and word choice. Each section heading could have an image of a puzzle piece; the proposal cover could be a puzzle. Use your imagination and creativity.

When determining the theme, ask yourself several questions to make sure it is on target.

- Is it simple?
- Is it expressed clearly?
- Is it congruent with the target audience and course content?
- Is it threaded through the entire proposal?
- Is it easy to grasp and remember?
- Does it relate directly to what the client wants or needs?
- Does the theme reflect the capture strategy?
- Is it visual as well as verbal?

"What separates a losing proposal with an effective solution and a good capture strategy from a winning proposal? A theme."
-- Karl Kapp

Avoid Common RFP Mistakes

Often vendors are blamed for poorly developed proposals when the real culprit is a poorly written RFP. Poor RFPs beget poor e-learning proposals. Many RFPs contain illogical statements, contradictory requirements, and blatant mistakes.

Many times, business managers write RFPs with little understanding of the instructional design process, emerging technologies, or the underlying causes of their unit's performance problems.

All the manager knows is that a problem must be solved and he or she assumes e-learning is the answer.

Avoid common RFP mistakes by:

- Clearly describing the business need driving the RFP.
- Providing accurate information.
- Establishing objective criteria for vendor evaluation.

- Providing appropriate hardware and software specifications.
- Providing explicit instructions concerning what you would like within the proposal.
- Reading the RFP over for typographical and grammatical mistakes....it is a representation of your organization.
- Checking for and eliminating contradictory statements.
- Asking vendors to include pricing and other information concerning on-going support costs.
- Considering integration issues regarding in-house ERP or CRM systems.

Good e-learning proposals can only come from good RFPs. Make sure you spend the time and energy to craft a well organized and well written RFP.

"A large number of RFPs are poorly written, unorganized and contain a conglomeration of disjointed ideas."

-- Karl Kapp

Presenting Your E-Learning Solution

A straight forward, dynamic, client-centered presentation wins e-learning business. A lackluster, boring or arrogant presentation loses business.

Keep these six tips in mind for a successful presentation.

- 1) **Create an agenda** – An agenda keeps everyone on track, foreshadows the topics you want to address and is a great "leave behind."
- 2) **Have a back up** – Technology can and does fail. Think of possible disasters and plan for them.
- 3) **Use a team approach** – Since e-learning requires many areas of expertise to properly develop, include several key team members at the presentation.

- 4) **Be enthusiastic** – Enthusiasm and energy are contagious. Each presenter should be exciting to watch and make an impression on the client.
- 5) **Turn off the projector** – Engage the client in meaningful conversation. Your presentation should not be a contest to see how many slides or screens you can show.
- 6) **Ask for the business** – Let the client know that you value and want their business. It's shocking how many presentations miss this element.

Many million dollar deals are closed based on personnel connections between clients and vendors. Make every effort to connect positively with the client selection team by offering a solution that makes their jobs easier and the business run better.

"Stand and Deliver!"

-- Adam Ant

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About the Contributors and Author

A unique aspect of this book is the contributions of over a dozen e-learning professionals. The book provides "both sides of the coin." The reader learns about the E-BAP from both the vendor and client perspectives. These different and sometimes opposed views bring depth to the work. *Winning E-Learning Proposals* will not only help you understand the proposal and RFP process but the e-learning industry as well.

- Clayton Ajello, Ph.D., Founder Accelera
- Ronald W. Berman, Ph.D., VP Education, Interwise
- Robert P. Delamontagne, Ph.D, Chairman and Founder, EduNeering
- Chad Hostetler, VP Operations, Get Thinking
- Richard Peck, Designer, IIT
- Timothy L. Phillips, Director, IIT
- Maria Plano, Manager E-Learning, RWD Technologies
- Carl Siedel, Strategic Account Manager, Newton Gravity Shift
- Stacey Smith, Designer, CTC
- Lisa Verge, Learning Products Manager, EduNeering
- Harold J. Bailey, Ph.D. Founder, Bailey Interactive
- Louis Biggie, Managing Director of Technology, Accelera
- Kathleen Ergott, Team Leader, Siemens Health Services
- Debra L. Newton, President, Founder, Newton Gravity Shift
- Francis Peters, Senior Education Consultant, Aetna
- Kevin Schmohl, Operations Manager, Universal Systems and Technology
- Linda Carroll Smith, Esq, Dilworth Paxson, LLP
- Nancy Vasta, Performance Consulting, CIGNA
- W. Scott Wein, Director Learning Support, Century 21 Real Estate Corporation

Karl M. Kapp, Ed.D., is a scholar, consultant, and expert on the convergence of learning, technology and business operations. His background teaching e-learning classes, knowledge of adult learning theory, and experience working with CEOs and front line staff provide him with a unique perspective on organizational learning.

He is the Assistant Director of the prestigious Institute for Interactive Technologies (IIT) and an Associate Professor of Instructional Technology at Bloomsburg University. Karl helps students and organizations understand how e-learning impacts employee productivity and learning.

Karl has been interviewed by *Software Strategies*, *Knowledge Management*, *Distance Learning* and *Training* magazines and has published dozens of articles in such publications as *Performance Improvement Quarterly*, *Journal of Organizational Excellence* and *Learning Circuits*. His views and insights into learning are highly sought.

Karl is committed to helping organization's develop a strategic, enterprisewide approach to organizational learning. He believes that effective education and learning events are the keys to increased productivity and profitability.

Visit Karl at www.karlkapp.com.

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