Business Writing in Action: Business Proposals and Reports

Inquire: Changing Work Environments

Overview

Today's workforce innovates and improves as new technologies emerge. Knowing how to take advantage of that technology is important, but persuading the company boss to take advantage of that technology is even more important. Once they say “yes,” it’s important to be able to demonstrate how the change has been successful. This lesson will teach you how to do both of these things. We will focus on what needs to be in a business proposal, how to write a business proposal, how to write a business report, and when to write either a proposal or report.

Big Question: How do you convince your boss to make changes at work?

Watch: Great Vacuum 5000!

When you hear the words “business proposal” or “business report,” you probably think of a very formal document. You might even think of a bound spiral report typed up and filled with graphs. While these two things are usually done in a formal manner, the idea behind a proposal or a report is quite simple.

A business proposal is a document or presentation that tries to persuade someone to buy a specific product. This product doesn’t have to be a specific item; it could be an idea or a process. A business report is a summary of business practices presented in a formal setting. So basically, a proposal seeks to persuade, and a report seeks to review.

Think of a business proposal like an infomercial. The first thing you see is a problem: a bad vacuum, messy Tupperware containers, etc. You see the person struggling with an old vacuum, then you hear a voice say, “Tired of your vacuum not cleaning your wooden floors?” Then, the same voice, much happier now, says, “Well not anymore! Introducing the Great Vacuum 5000!” You then see examples of the Great Vacuum 5000 doing its job and doing it well! The commercial shows several examples of how it works, and how it is better than any other vacuum. This is an example of a business proposal.

You should write a business proposal when you have an idea, product, or generally any solution for your workplace. This lesson will teach you how to write a business proposal as well as a business report. Have you needed to write either of these before? Can you think of a time when you might need to in the future?
Read: Proposals and Reports at Work

Overview

One of the most common presentations you will have to give in your professional life is a **business proposal** or a **business report**. This lesson will focus on what to include and how to know when you should put one together, if given an opportunity.

What Goes into a Business Proposal?

A business proposal is a document put together to persuade someone to buy a specific product. A product doesn’t have to be a physical item; it could be an idea or a process. This proposal needs several things in order to be successful. First, it needs an introduction that offers a brief summary of what you are offering and why it would be beneficial for the buyer.

Second, you should clearly outline the terms of what is being offered and what should be given in exchange. This section justifies the price by providing data to support the buyer’s decision to purchase the product.

Finally, explain what needs to be done, and offer a timeline. Tell the buyer what they need to do to finalize the sale and when it needs to be done. If the buyer doesn’t have a clear timeline, the deal might lapse.

How to Write a Business Proposal

You learned earlier what goes into a proposal; this section will explain how to write those sections. First, you should read the proposal request to know what the audience wants from you. You can’t hope to put a successful proposal together if you don’t know what your audience is looking to buy in the first place.

Second, start writing. Introduce the problem your product can solve. Then provide any context or definitions the buyer might need to understand your product. After that, it’s time to introduce your solution(s). This should be the product you are selling and should include an explanation of how your product actually solves the problem. Once you have established what you have to offer, you should establish a timeline. How long does the buyer have to make a decision? How long will it take you to deliver once they have made a choice? You want to answer both of these questions in the proposal. Finally, you should explain how you are different from and better than other solutions. For the proposal to be successful, explain how your solution is the best one.

Third, edit and format the proposal to be readable and professional. A list of data isn’t always appealing to look at or easy to understand. Once you have all of the data you need, format it to be eye-catching and simple to grasp. You might translate the information into something resembling an academic paper or maybe a slide show that clearly explains all of the necessary data. Find out what the buyer would prefer, and make the data match their expectations. Finally, include a cover page that includes the title of your proposal, your name, and your email contact information.

How to Write a Business Report

Sometimes, you will be asked to report how you are doing within your department. A business report is a summary of business practices presented in a formal setting. This section will help you figure out what you should put into a business report when you are asked to put one together. First, identify the objective
of the report. Determine what data you need to present. Second, know your audience. Some audiences may need additional background information or supporting data to be persuaded. Knowing who your audience is will help you know what information you need to gather.

Third, gather the data necessary to support any claims you make. Your company will have specific procedures for how to gather data, so make sure you know what those are based on where you work.

Fourth, organize and edit the report so that it is readable and professional. Data need to be presented in a way that they are easily understood. Put effort into creating a readable report rather than a wall of data.

Fifth, have conclusions with specific, actionable steps to address issues. Reports should be constructive. Show what you do well, but also present recommendations for how you could improve or how others could model you to be successful. Be specific in these recommendations so they are helpful to the company and reflect well on you.

Finally, write a summary that includes a brief abstract of every part of the report. Not everyone will be able to see you present your report or have time to read the in-depth findings. An executive summary will be helpful to others in your company, so it’s a good practice to include one.

When to Write a Proposal or Report

There are three times you should write a business proposal or a business report. The first is when you are asked. If your boss wants you to write one, you should take the time to do so. Sometimes these requests will be optional, but if you do well at putting it together, it reflects well on you.

Sometimes the request for a report or a proposal won’t be optional. Obviously, when you are told to write one, you should do so.

Business proposals can be an opportunity to advance yourself. So, when you feel you need to grow in your job, seek out opportunities to compose and submit business proposals.

Reflect Poll: Proposals vs. Reports

If you were a business owner, would you prefer an employee to present a report that shows what your company is good at or a proposal that allows you to grow into new things?

- Report
- Proposal

Expand: Presenting Your Presentation

Overview

Business proposals or reports can be great tools to persuade an audience that you speak with authority and should be listened to. But, they don’t do any good on their own. You need to know how to effectively present that information for maximum effect. This section will help you put together visual aids that will take your presentation to the next level.
Making a Visual Aid

A visual aid is a visual representation of information meant to complement and enhance a presentation. Often, people use PowerPoint slides to integrate visuals into a presentation. When making a visual aid, the most important thing to keep in mind is readability. Your background should be a neutral color, and the text should contrast well. Choosing something like a neon yellow background with purple text is not a winning decision. Instead, choose something like a white or gray background with black text. It’s challenging to make your visual aid interesting and attention-grabbing without it being distracting or obnoxious. Default themes within PowerPoint programs are a great way to address this issue.

Once you have a readable format, consider the information you include. You don’t want to overload slides, so include only the most important information. Often, this will be data or charts to show how you or your group are doing. Don’t read the slides to your audience, but use them to augment what you are saying. Be ready to explain what’s on the slide and not have the slides speak for you.

Lastly, practice your presentation. You don’t want the visual aid to be distracting, so ensure you can smoothly change slides, reference information, and keep your words and your slide show in sync. If you aren’t practiced with the presentation, it can’t help you because you don’t remember what’s there. When you practice your presentation, use the visual aid so that it is easier to incorporate into the real presentation.

Lesson Toolbox

Additional Resources and Readings

An article providing recommendations on how to write business proposals
- Link to resource: https://fitsmallbusiness.com/how-to-write-a-business-proposal/

An article providing several kinds of business reports and how to write them
- Link to resource: https://www.wikihow.com/Write-a-Business-Report

An article providing some tips on how to put together a visual aid for a presentation
- Link to resource: http://wittcom.com/10-tips-for-using-visual-aids/

Lesson Glossary

business proposal: a document written to persuade someone to buy a specific product
business report: a summary of business practices presented in a formal setting
visual aid: a visual representation of information meant to complement and enhance a presentation

Check Your Knowledge

1. A business proposal tells your boss about things your company is already doing.
   a. True
   b. False
2. A business report is something that persuades someone to buy a product.
   a. True
   b. False
3. Visual aids should have a neutral colored background with black font.
   a. True
   b. False

Answer Key:
1. B  2. B  3. A

Citations

Lesson Content:
Authored and curated by Alexander Amos, Elizabeth Amos for The TEL Library. CC BY NC SA 4.0