

EDITING PROPOSALS

Shortcuts for short schedules

**EDITING IS ANOTHER
THING TO FIT INTO YOUR
PROPOSAL SCHEDULE.**

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PROPOSAL SCHEDULE.**

So why do we bother?

**PROPOSALS MUST
REFLECT OUR FIRMS'
DEDICATION TO QUALITY.**

**EDITING PROVIDES A
SAFETY NET FOR OUR
FIRMS' INVESTMENT.**

**WE MAKE TIME FOR
EDITING BECAUSE WE
TAKE PRIDE IN OUR WORK.**

STEP 1:
PREPARE

**THE BEST SHORTCUT IS
PLANNING AHEAD.**

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PLANNING AHEAD.**

I know—not what you wanted to hear!

**THINK ABOUT YOUR
IDEAL PROCESS.**

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IDEAL PROCESS.**

Who, what, when, where, how?

THINK ABOUT YOUR IDEAL PROCESS.

Who, what, when, where, how?

- > Substantive editing*
- > Copy editing*
- > Compliance check*
- > Graphics QC*

EXAMPLE PROCESS #1

**Develop
content**

**Substantive
edit of
draft
content**

**Address
edits**

**Design
proposal**

**Copy
edit/final
compliance
check**

**Make
final edits**

**Print/
final flip-
through**

EXAMPLE PROCESS #2

**Develop
content**

**Design
proposal**

Proofread

**Make
final edits**

Print

EXAMPLE PROCESS #3

The colorful reviews:

- > **PINK TEAM (30%):** *Do we have the right pieces?*
- > **RED TEAM (70%):** *Is the story coming together?*
- > **GOLD TEAM (100%):** *Final edits to polish the proposal.*

EXAMPLE PROCESS #4

“Can you look at this before it prints?”

- > Quick compliance check*
- > High-level proofreading*

ONE-PERSON MARKETING DEPARTMENT PROCESS

You can:

- > *Make a compliance checklist and style guide*
- > *Look for “non-traditional” partners*
- > *Reach out to teaming partners*
- > *Build a break into your schedule*

**YOUR PROCESS NEEDS
TO FIT **YOUR** WORKFLOW
& RESOURCES.**

**BUILD TOOLS THAT
SUPPORT YOUR PROCESS.**

BUILD **TOOLS THAT SUPPORT YOUR PROCESS.**

Think about:

- > *Foundational resource(s)*
- > *Style guide*
- > *Checklists*

FOUNDATIONAL RESOURCES

Formal references:

- > *AP Style*
- > *Chicago Manual of Style*
- > *GPO Style Manual*
- > *APA Style*
- > *Others*

FOUNDATIONAL RESOURCES

Less formal references:

- > *Whatever Google says*
- > *Merriam-Webster (or your preferred dictionary)*
- > *Grammar Girl*

STYLE GUIDES

Why do you need 'em?

- > Provide guidance on usage*
- > Maintain consistency*
- > Save time*

STYLE GUIDES

Consider:

- > *Commas*
- > *Spaces*
- > *Abbreviations/acronyms*
- > *Numbers*
- > *Bullets/captions*

CHECKLISTS

Proposal Editing Checklist

Start with a substantive edit—is the proposal:

- Easy to navigate?
- Organized in the same order as the RFP?
- Compliant with the RFP requirements?
- Written clearly?
- Using an appropriate tone?
- Using a consistent voice (or the brand voice)?
- Making sense?
- Resonating with the audience?
- Using graphics to support the message?
- Clearly explaining benefits?
- Meeting the goals of the project team?

Move on to a line edit—evaluate:

- Consistency
- Clarity
- Concision
- Voice/tone
- Jargon
- Word usage
- Readability

Proofread the document—look for:

- Grammar errors
- Spelling errors
- Punctuation errors
- Bad line breaks
- Widows and orphans
- Patterns/repetition
 - Do all bullets end with a period?
 - Are all acronyms spelled out on first use?
 - Do project descriptions on resumes start with the client name?
- Adherence to style guide

Graphic Design Checklist

Before you pdf or print your proposal, review for the following things:

- Multiple spaces** after periods
- Proper use of **em dash/en dash/hyphens**
 - No spaces around **em dashes (—)**. Use em-dashes to separate thoughts, categories, etc.
 - No spaces around **en dashes (-)**. Only use en dashes in numbers (replacing word “through,” such as 2011–2015)
 - No spaces around **hyphens (-)**. Only use hyphens in hyphenated words or line breaks
- No spaces around **slashes (/)**
- Single space before/after **pipes (|)**
- No periods after **one sentence bullets**
- Small caps for registrations** on org chart and short bios
- Alignment/spacing of text and graphics**
- Photo placement/cropping/size**
- Photo credits** as needed
- Consistent **headers/footers**
- Consistent use of **paragraph/character styles**
- Preflight checks**
 - Non-proportional scaling of placed objects
 - Images below 200 dpi
 - Overset text
 - Missing fonts/glyphs
 - Missing/modified links



**REGULARLY EVALUATE
YOUR PROCESS & TOOLS.**

Don't invest in creating these just to have them sit on a shelf.

**PROVIDE TRAINING ON
THE PROCESS & TOOLS.**

PROVIDE **TRAINING** ON THE PROCESS & TOOLS.

Get buy-in from:

- > *Marketing staff*
- > *Technical staff*

**BUILD YOUR
EDITING SKILLS.**

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Through:

- > *Practice*
- > *Feedback*
- > *Reading*
- > *Webinars/training*

STEP 2:
PLAN FOR THIS
PROPOSAL

**HOW WILL YOU APPLY
YOUR PROCESS TO THIS
PARTICULAR PROPOSAL?**

**BUILD EDITING TIME
INTO YOUR SCHEDULE.**

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Think about:

- > Time for the “ideal” process*
- > Communicating to your PM*
- > Being ready for the “waterfall effect”*

WHAT IS THE **WATERFALL** EFFECT?

WHAT IS THE **WATERFALL** EFFECT?

How missed deadlines impact and compress the rest of the schedule.

**LINE UP YOUR
RESOURCES.**

LINE UP YOUR RESOURCES.

Consider:

- > *How long is the proposal?*
- > *When will it be ready for review?*
- > *How much review time is there?*
- > *Who's the best person to edit?*

**GATHER AND PREPARE
YOUR TOOLS.**

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Give the editor:

- > A copy of the RFP*
- > Your outline/compliance checklist*
- > Any purposeful deviations from style guide*
- > Any other notes you'd like them to look for*

**COMMUNICATE DURING
THE PROCESS.**

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*Discuss any deviations from the
agreed-upon plan.*

STEP 3:
PANIC

**SOMETIMES, THE PLAN
DOESN'T GO AS PLANNED.**

SOMETIMES, THE PLAN DOESN'T GO AS PLANNED.

Instead of panicking:

- > Assess the situation*
- > Identify resources*
- > Use your tools*
- > Manage expectations*

**ASSESS YOUR SITUATION
AND OPTIONS.**

ASSESS **YOUR** SITUATION AND OPTIONS.

Consider:

- > *How much time is left to edit?*
- > *How long is the proposal?*
- > *What needs to be done?*
- > *What is your plan of attack?*

**IDENTIFY THE
RESOURCES AVAILABLE.**

IDENTIFY THE RESOURCES AVAILABLE.

Think about:

- > *Who is editing?*
- > *How is editing happening?*
- > *How are edits getting incorporated?*

**KNOW YOUR “IN CASE OF
EMERGENCY” TOOLS.**

KNOW YOUR “IN CASE OF EMERGENCY” TOOLS.

When there's just no time:

- > *Run spellcheck—in Word, PowerPoint, or InDesign*
- > *Consider the Hemingway App or Grammarly*
- > *Use the “five-second flip-through”*

Feedback | Help

Rich text editor toolbar: Bold, Italic, H1, H2, H3, Quote, Bullets, Numbers, Link

Desktop App

Just Released!
Version 3.0!

Like 66K

Hemingway App makes your writing bold and clear.

The app highlights lengthy, complex sentences and common errors; if you see a yellow sentence, shorten or split it. If you see a red highlight, your sentence is so dense and complicated that your readers will get lost trying to follow its meandering, splitting logic — try editing this sentence to remove the red.

You can utilize a shorter word in place of a purple one. Mouse over them for hints.

Adverbs and weakening phrases are helpfully shown in blue. Get rid of them and pick words with force, perhaps.

Phrases in green have been marked to show passive voice.

You can format your text with the toolbar.

Hemingway Editor

Readability

Grade 6

Good

Words: 133

Show More

2 adverbs, meeting the goal of 2 or fewer.

1 use of passive voice, meeting the goal of 2 or fewer.

1 phrase has a simpler alternative.

1 of 11 sentences is hard to read.

1 of 11 sentences is very hard

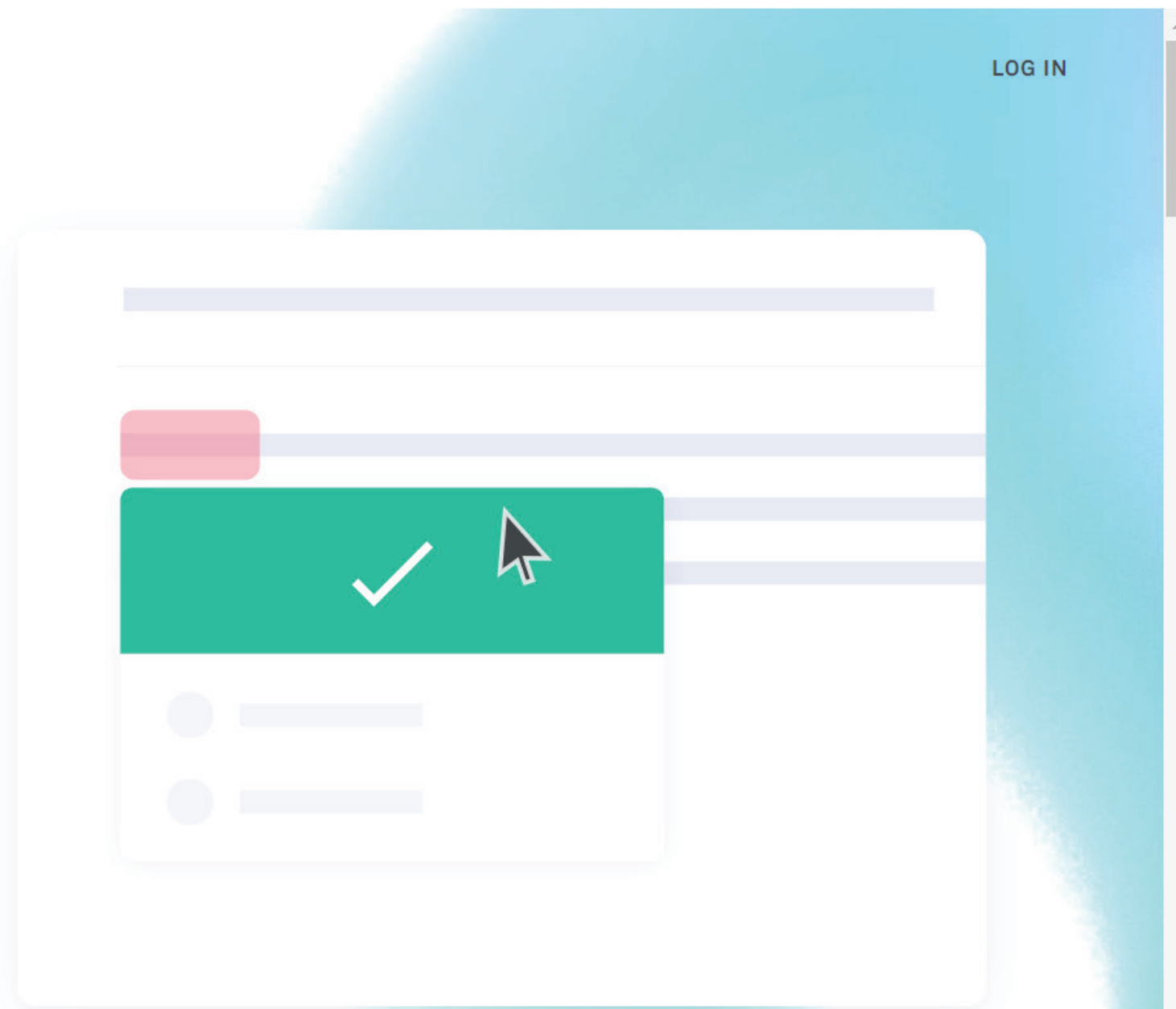


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WHAT'S THE **FIVE-SECOND** **FLIP-THROUGH?**

WHAT'S THE **FIVE-SECOND FLIP-THROUGH?**

Print the document:

- > Review each page quickly*
- > Note anything that jumps out*
- > Address those edits*

**FINALLY, MANAGE
EXPECTATIONS.**

FINALLY, MANAGE EXPECTATIONS.

If you're the editor:

- > Talk about timeline*
- > Determine what's possible*

FINALLY, MANAGE EXPECTATIONS.

If you're the marketer:

- > Communicate with your PM*
- > Think downstream: recovery, "final look," production*

**BE REALISTIC AND
GET IT DONE.**

*An on-time but messy proposal
is better than a perfect proposal
that missed the deadline.*

**DON'T FORGET
THE DEBRIEF.**

DON'T FORGET THE DEBRIEF.

Discuss:

- > What went right*
- > What went wrong*
- > Any changes needed—to process or tools*
- > Who is addressing the changes*

CLOSING THOUGHTS:
LESSONS LEARNED

**IF YOU FAIL TO PLAN,
YOU ARE PLANNING
TO FAIL.**

> *Ben Franklin*

**POOR PLANNING ON
YOUR PART DOES
NOT NECESSITATE AN
EMERGENCY ON MINE.**

> *Bob Carter / Also my dad*

**IF YOU DO WHAT
YOU'VE ALWAYS DONE,
YOU'LL GET WHAT
YOU'VE ALWAYS GOT.**

> *Henry Ford*

THANK YOU!
ANY QUESTIONS?



JEN MCGOVERN, CPSM

Regional Marketing Manager

VHB

jmcgovern@vhb.com