

# Reviewing, Editing and Proof Reading for Proposals

by Dave Chapman

Reviewing, editing and proof reading are three distinct tasks that require different people with different skills. Be sure to do all three well. Review objectively before using an Editor; have the document edited before someone proof reads.

But you have to be sure each task is performed separately by a different person. No more than one of these tasks can be carried out by the same person and none of these tasks should be carried out by the person who wrote the material. Each task must be done by someone who is new to the material. That way, they take an objective view.

## Reviewing Proposals

Reviewing needs specialist knowledge to assess content and effectiveness of your proposal.

"The most effective [review] teams include experts on: the prospect; the prospect's industry; competitors; your organisation, technology and approach; and on preparing and presenting winning proposals."

– Shipley *"Proposal Guide", second edition*

Reviewing should follow these rules:

- Invite five or six people with the specialist knowledge to assess overall content for relevance to your client
- Keep reviewers independent of the proposal team
- Pink Team review should confirm your strategy. Red Team should see a near-complete proposal

- Regular internal reviews of content will avoid gaps, unanswered questions and late panics
- Allow reviewers access to paper copy only – they mustn't waste time changing style and grammar
- Reviewers should write comments on a review sheet – not annotate the proposal.

Reviews in large companies need careful organisation. Reviews in small companies may require 'external' help.

## Editing Proposals

Editing cuts and strengthens text for readability and impact bringing consistency to diverse material.

"The objective of a proposal is not truth but persuasion."

– *Consultant's Guide to Proposal Writing*, Herman Holtz

A good Editor will achieve the following:

- Strengthen messages and remove ambiguity missed by the proposal team through familiarity
- Reduce word count – we all tend to use words and phrases that are unnecessary
- Work to a proposal-specific 'Conventions List' in conjunction with the company Style Guide.

Editing cannot transform 'boilerplate' or re-used text into client-focused text. An Editor needs time to raise queries and discuss changes with the team.

## Proof Reading Proposals

"Errors in spelling, punctuation, and grammar and other small mistakes can communicate to a reader that you are careless, hasty, ignorant or disrespectful ... such mistakes are background noise that can interfere with your message."  
– *"Persuasive Business Proposals"*, Tom Sant

Some facts about proof reading proposals

- People close to a proposal miss obvious errors
- 'Spellchecker' often allows correctly-spelled words that are totally wrong in a sentence context
- You cannot proof read your own work
- Proof Readers need to work with a Conventions List, Style Guide and agreed proof readers' marks
- Allow dedicated time immediately before the bid goes to print
- Proof reading is difficult unless the work has been reviewed and edited first.

In a large company, use a team member from another bid. In a small company, use someone independent of the bid – but not you!

### Ten Top Tips for Proof Readers

1. Proof reading can't be hurried. If someone says "Take a look at this", it's only a one-minute job.
2. Allow an hour for 10-15 pages, but speed varies with complexity. Finish early and you have time to reflect. Too little time – you will overlook something.

3. Tell colleagues you're proof reading and use a sign – "I'm Proof Reading" – or find a quiet corner or room.

4. Use a Conventions List from the Editor, and refer to the company Style Guide.

5. Use agreed Proof Readers' Marks. Mark the page precisely and unambiguously with red pen or pencil.

6. Put a comment or question mark in the margin if you are unsure – and continue reading. If it affects your ability to continue, get an immediate decision.

7. Don't rewrite text or insert new material – except for a few words – unless not doing so seriously threatens effective communication with the reader.

8. Be prepared to discuss your corrections with the Proposal Manager or Editor. Keep notes separately, especially if discussion isn't possible immediately.

9. Mark the page exactly where you stopped, when taking a break. It's easy to start at the wrong line.

10. You are not infallible and not an authority on the English language. You bring a fresh, objective view to text other people have worked on for days or weeks. Be thorough – and just use common sense.

*© 2008, Proposal Writers Limited*