Proposal Page and Document Design Guide

A Comprehensive Guide

Baachu scribble

Introduction

The overall design and layout of your proposal documents is critical not just for communicating your information, but also for making an impression on reviewers and evaluators.

There are many important considerations to keep in mind when it comes to document design. For starters, documents must:

Follow instructions or guidelines from the customer, your company, and/or your writing outline

Be aesthetically appealing in an appropriate and professional way

Use design techniques to highlight specific text and information

Be produced efficiently using the tools and resources available

Introduction

Stylistic choices must be made in consideration of any constraints and using an established clear document template.

Your team must be empowered with the right tools and an understanding of appropriate metrics and milestones to effectively produce a professional document.

Your team must be empowered with the right tools and an understanding of appropriate metrics and milestones to effectively produce a professional document.

Best Practices
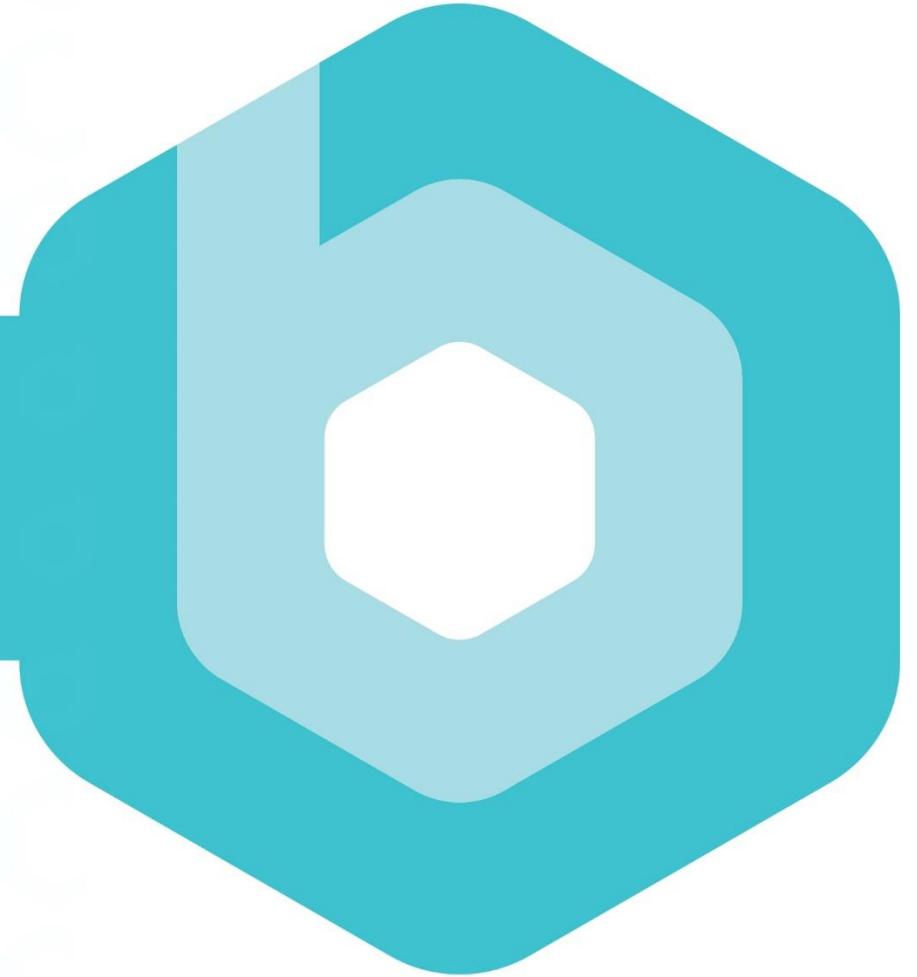
1. Understand the desktop publisher's role

A desktop publisher's primary role includes creating and implementing a document template that is compliant with instructions and applied consistently over all pages or files of a proposal submission.

A desktop publisher may also be required to insert, label, and number graphics within a document , a list of figures and tables; and coordinate with editors, writers, and graphic designers to ensure consistent style.

The desktop publisher may also interface with any physical production, including printing and creation of electronic files.

2. Choose the right tools

Desktop publishers should be familiar with the document formatting tools that are most relevant in their industry and keep updated on new versions and new features of the software.

3. Create a document template to ensure compliance and consistency

A document template can be created using the same software and same version.

A document template must first be compliant: It must follow all customer guidelines as provided and any corporate branding or style guidelines, as relevant. In lieu of any specific requirements, refer to corporate branding or style guidelines. If none exist, reflect the standards seen most commonly in your industry.

Second, a document must be consistent. Consistency not only ensures information is presented in a way that reflects stated requirements, but also communicates your company's level of professionalism.

3. Create a document template to ensure compliance and consistency….

To achieve consistency and compliance, create a document template and provide it to all team members early in the proposal process. A document template includes (but is not limited to) the following items:

Final production information. Information such as whether the document is to be printed and bound or delivered electronically, page size and orientation and type of graphics or other design elements to be used.

Page margins. This includes margin width on all four sides of a document.

Column size and number. One column is the most common and easiest format to work with. Multiple columns can slightly increase the number of words included per page and can provide additional dynamic visual interest when successfully integrated with other elements.

3. Create a document template to ensure compliance and consistency....

Header and footer style. Headers and footers should be applied to the top and bottom, respectively, of every page in the document. These assist the evaluator in tracking the document, section, and page they are reviewing and may also include identifying markers such as company logo, name of proposal or bid, and submission date.

Font family or typeface. Specify font family or typeface using your software's type-style functionality.

3. Create a document template to ensure compliance and consistency....

You should further define how to treat the following types of textual information:

Body or "normal" text – the majority of text-based information

Headings – used to break up large blocks of body text, may be a different font family, different color, numbered according to document outline, or otherwise different to attract emphasis

Bulleted lists – include the style of glyph used preceding every list, such as a small ball, square, or dash

Text you want to emphasize – on a typical page of proposal text, the best way to emphasize a short word or phrase is by using boldface; other options include underlining and italics

Callouts or testimonials – this may include design elements, such as a colour or a box around text, to draw emphasis

3. Create a document template to ensure compliance and consistency....

Choose fonts based on instructions or style guides. When none are given, choose a common and legible font such as Arial, Times New Roman, Calibri, or Cambria. Use type no smaller than 10 or 12 pt (outside of graphics or tables, which may be as small as 8 pt).

Colours. Colours can be used in conjunction with design elements in the header and footer (such as a line), in tables, in headings, or other textual information. Chosen colours should be reflective of the end customer, a bidder's corporate branding, or a combination of the two.

3. Create a document template to ensure compliance and consistency....

Graphics styles. Specify how graphics are to be integrated with text. Generally, graphics are designed to physically fit within the margins or columns of the document, are sized for appropriate resolution (for print or online viewing), appear after they are referenced in the text, and are associated with an action caption.

3. Create a document template to ensure compliance and consistency….

Special templates for individual sections. You may need special templates for sections such as Q&A sections, resumes, past performance/corporate experience, or the Executive Summary. Use tables to organize frequently referenced information (such as dates, project names, or staff titles). You can also use tables to provide an easy structure for concepts like question/answer, feature/benefit, and company/competitor, which can be used throughout documents in the bid or proposal.

Document templates should also be designed within the constraints of the desktop publisher's skill level, the available software to be used, and the time available to successfully produce a compliant and consistent document.

4. Schedule effectively using metrics

Clearly schedule desktop publishing resources to ensure sufficient time to produce professional proposal or bid documents.

Documents may be formatted in parallel to writing/editing as long as they are separated by section or volume in a logical manner that does not impede progress or version/configuration control. This parallel system is ideal for large submissions. For smaller documents, formatting may be done in a serial fashion after all writing/editing is complete.

4. Schedule effectively using metrics

Formatting should align with major review cycles and may require reformatting or rechecking of formatting.

The larger the document, the more times it should be reviewed and potentially formatted or reformatted.

Successful teams track productivity metrics over time and use those to develop tailored best practice timelines that can be included in their overall scheduling.

5. Prepare for production

The desktop publisher may be required to create print-ready documents for physical production and/or create final files for various methods of electronic delivery.

The most common format for printing and for electronic delivery, outside of specific desktop publishing software formats (such as .doc or .docx format) is a portable document format (PDF) file. It uses the same coding language, PostScript, that all printers use and also "locks" or renders text, graphics, tables, and other elements unable to be changed easily, so that others cannot manipulate your information.

5. Prepare for production

PDF files can also be manipulated to decrease overall file size without the need to update every included graphics file individually. This is useful for uploading, emailing, or other electronic sharing methods that have file size limitations.

PDF files, in their most advanced state, have additional functionality that may be relevant for some bid or proposals. These features include security settings, easy-to-use forms, multimedia options, and the ability to hyperlink within and between documents.

6. Use graphic elements to create emphasis and guide readers

Beyond being consistent and compliant, proposals should be easy to understand and evaluate.

Whether reviewing online or in a print format, all evaluators for languages use top-down reading or viewing which is interrupted by items that contrast with the rest of the page, including items that are colorful, are graphic or visual, or are otherwise unusual to the layout.

These interruptions draw attention to specific information and can be used to highlight points that readers might otherwise miss. Not including any elements that break up reading, on the other hand, can be detrimental due to which key messages may be lost.

6. Use graphic elements to create emphasis and guide readers

To increase the effectiveness

of any page layout, put the most

important item in the top left of

the page and include

at least one visual element.

7. Apply six design strategies to create effective layouts

Contrast creates emphasis between visual items and can highlight or hide information. Create contrast with big and small elements, black and white text, squares and circles, and other binary/opposite pairings.

Proximity, or physical/visual closeness, establishes a bond between elements on a page and helps readers understand when two or more concepts are related.

White space gives pages breathing room and a "break" to readers. White space must be balanced with concerns regarding page limitations and may be decreased to include more text-based information or graphics.

7. Apply six design strategies to create effective layouts

Consistency in use of design elements, font, color, and graphic/table styles helps evaluators navigate information more efficiently. It can aid in comprehension and signal information levels.

Balance can be applied throughout the document layout and includes arranging elements on the page so that no one section is "heavier" than the other. Columns, graphics, tables, and other elements can be used to create balance. The placement of elements can also suggest a company's sensibility.

7. Apply six design strategies to create effective layouts

Consistency in use of design elements, font, color, and graphic/table styles helps evaluators navigate information more efficiently. It can aid in comprehension and signal information levels.

Balance can be applied throughout the document layout and includes arranging elements on the page so that no one section is "heavier" than the other. Columns, graphics, tables, and other elements can be used to create balance. The placement of elements can also suggest a company's sensibility.

Alignment, or the relationships of parts of a page (text, headers, graphics, tables, etc.) to each other, can make a layout easier or more difficult to read and can influence readers' perceptions of written content. Desktop publishers may use other design elements, such as proximity, white space, balance, or contrast, to achieve alignment.

Common Pitfalls and Misconceptions

Common Pitfalls and Misconceptions

Presumptions about staffing and resources

Some companies mistakenly assume that simply because a piece of software is present on employees' computers, their staff understand the software well enough to use it proficiently which can prevent companies from giving staff the training they need to use software most effectively.

In addition, companies can grossly underestimate the time, techniques, and budgets necessary to produce a finished document.

Inconsistency in document formatting

Documents that are created inconsistently or without a template are far less likely to succeed.

Disclaimer
While an effort is made to use the most accurate available information, Baachu does not guarantee that the information shared is always current. Baachu does not warrant or make any representations as to the content, accuracy or completeness of the information, text, graphics, links and other items contained on its printed material and web pages.

07718193599   baskar@baachu.com   www.baachu.com   @baachuworks