

THEME STATEMENTS

Theme statements in proposals link a customer benefit to the discriminating features of your offer. Themes tell readers why they should select you. The most powerful themes contain the most important and unique discriminators, something the customer wants that no one else offers.



Win themes or major themes apply to the entire proposal. They usually tie a single, unique discriminator to a critical customer need:

Development risk and cost are eliminated by selecting the only transport aircraft in this class that is in current production.

Theme statements are not sales slogans, like the catchy phrases most commonly seen in consumer marketing:

Have it your way™

Where's the beef?™

Just do it™

Be all you can be™

We try harder™

Section, topic, or paragraph themes are specific statements that appear in a consistent place and style within a proposal.

Section themes are the primary focus of this section.

Business capture teams sometimes confuse strategies and theme statements. **Strategies** = things to do. **Themes** = things to say. Effective strategies have two parts:

See PROPOSAL STRATEGY.

- **Strategic:** The position you will take
- **Tactical:** The specific actions you will take to attain the desired position

Inserting theme statements in a proposal is one tactical way to implement a strategy.

Experienced business development professionals often use the terms *theme* and *strategy* interchangeably, confusing both their customers and their sales support teams.

THEME STATEMENTS

1

Use a logical process to brainstorm theme statements.

2

Use theme statements consistently.

3

Link benefits to features, trying to state benefits first.

4

Quantify benefits if possible.

5

Draft concise theme statements, preferably in a single complete sentence.

6

Differentiate section theme statements and section summaries.

7

Ensure benefits go beyond advantages.

8

Tailor your theme structure and approach to the evaluation process.

9

Use the Theme Litmus Test to enhance the impact of your theme statements.

1 USE A LOGICAL PROCESS TO BRAINSTORM THEME STATEMENTS.

See **DISCRIMINATORS and FEATURES, ADVANTAGES, AND BENEFITS.**

Following a logical process enables you to develop meaningful theme statements more consistently and rapidly. Use the following theme

statement brainstorming checklist to help you determine the key point you want the customer to remember:

- What is the point of this section?
- Why should the customer be impressed with what you're proposing?
- What aspect of your offer or approach makes it worth buying?
- What do you offer that is different from competitors' approaches?
- What makes your offer unique, desirable, or beneficial?
- What does your offer do for the customer?
- Why should the customer prefer your offer and organization over the competition?
- Does your offer answer the question, *So what?*

While helpful, you do not need to substantiate your claim in the theme statement, but you must substantiate your claim in the proposal.

Brainstorming theme statement contents sparks creative input from the entire team.

You may prefer to develop theme statements more logically. Proposal

theme statements should flow from the capture and proposal strategy. If you have neither, follow the process outlined below:

1. List the customer's issues.
2. List a feature of your solution that addresses each issue.

2 USE THEME STATEMENTS CONSISTENTLY.

See **PAGE AND DOCUMENT DESIGN.**

Place theme statements consistently throughout the proposal at the beginning of every major section, subsection, or summary. If you use theme statements in the first- and second-level sections, (section 3 and section 3.1, for instance), use them for all first- and second-level sections. If you insert theme statements at other points in the proposal, do it consistently.

Give theme statements an identical appearance. Most theme statements are visually emphasized to differentiate them from body text, as illustrated in figure 1. The amount of emphasis

3. Define the issue as specifically and uniquely as possible.
4. Identify a similar success story. Try to quantify the benefit.
5. Draft a theme statement linking the feature and the quantified benefit to a customer issue and substantiate the claim in the proposal.

Review the following examples to see how these five steps would work:

1. *A customer in the travel clothing and accessory business is concerned about increasing telemarketing sales revenue.*
2. *You sell IT support services, including supplying and supporting Point-of-Sale software and terminals for e-commerce and catalog sales.*
3. *Individual sales clerks often do not know the customer's purchase history, interests, or which related items they could recommend.*
4. *You helped a client achieve a 35 percent increase in dollars per order in a similar situation with a bicycle component and accessory telemarketing retailer.*
5. *Incorporate the previous information into a theme statement: If Expedition Clothing sees gains similar to Saddle Bike Company, your typical \$100 per order sale would increase to \$135, for a total annual revenue increase of \$3.5 million, after installing Sales Aide™ software and terminals.*

can vary from the minimal emphasis of a single-sentence opening paragraph in standard body text font to a large, bold, colored font surrounded by white space, borders, shading, or other emphasis devices.

Writers forced to create theme statements when they have no discriminating features will often draft poor, ineffective theme statements. When too many theme statements are included, no matter where they are placed, evaluators have said, "We knew that was the marketing hype, so we ignored them."

1. TOP AND BOTTOM RULES

2.0 TITLE

Our team of 47 software engineers has a combined total of over 600 years of experience designing, testing, and installing conversion software on time and within budget.

2. SECOND COLOR CONTRASTING FONT

2.0 TITLE

Our team of 47 software engineers has a combined total of over 600 years of experience designing, testing, and installing conversion software on time and within budget.

3. SHADED BOX, SECOND COLOR, TWO-COLUMN FORMAT

2.0 TITLE

Our team of 47 software engineers has a combined total of over 600 years of experience designing, testing, and installing conversion software on time and within budget.

Unified Network Management provides integrated end-to-end control of all your physical network resources. The result is direct, dedicated, quality service ...

Figure 1. Give Theme Statements a Consistent, Appropriate Emphasis. Different styles are appropriate for different customers and markets. Select a tasteful, appropriate style for your customer and use it consistently throughout each proposal.

3 LINK BENEFITS TO FEATURES, TRYING TO STATE BENEFITS FIRST.

Evaluators must see a clear, logical link between the benefit and the feature included in each theme statement. While every benefit could plausibly be linked to lower cost, you do not have to take them all that far.

Poor example

Our Easy Link™ software will reduce your cost.

Better example

The intuitive, graphical user interface of our Easy Link™ software can reduce your training time from 4 hours to 1 hour.

Customers buy benefits, not features. Improve the customer focus of your theme statements by stating the benefit before the feature. The impact is subtle but makes the theme statement more persuasive.

Best example

Reduce your training time from 4 hours to 1 hour due to the intuitive, graphical user interface of our Easy Link™ software.

If benefits and features are clearly linked and the features are discriminators, then you have an effective theme statement.

See CUSTOMER FOCUS.

4 QUANTIFY BENEFITS IF POSSIBLE.

Theme statements that include quantified benefits tend to be more credible.

Theme statement—benefit not quantified

Reduce order entry cost by installing e-Entry™ order entry software.

Theme statement—benefit quantified

Reduce order handling cost 30 percent by installing e-Entry™ order entry software.

Quantified benefits must be supportable. If you cannot support your claims, change your theme statement. Support your claims in the proposal shortly after making the claim.

Whenever possible, quantify the benefits collaboratively with the customer. Customers who help determine the potential benefits of your solution are more likely to continue to believe the calculation is correct.

State the quantified benefit realistically and precisely. Broad generalizations are perceived broadly; overly precise numbers will not be believed.

For example, the 30 percent savings in the previous theme statement will be interpreted as plus or minus 5 to 10 percent:

Theme statement—benefit more precisely quantified

Reduce order handling cost 33 percent by installing e-Entry™ order entry software.

Depending on how the calculations were completed, the following theme statement borders on being too precise:

Theme statement—benefit more precisely quantified

Reduce order handling cost 33.4 percent by installing e-Entry™ order entry software.

The following theme statement is too precise to be credible:

Theme statement—benefit too precisely quantified

Reduce order handling cost 33.37 percent by installing e-Entry™ order entry software.

5 DRAFT CONCISE THEME STATEMENTS, PREFERABLY IN A SINGLE COMPLETE SENTENCE.

The longer the theme statement, the more likely the evaluator will not read it. Writing short, concise, discriminating theme statements can be difficult.

If you can remove any words in your theme statements without changing the meaning, do it. If you can use a shorter but still accurate word, do it. If you can use a short, active verb instead of jargon, do it.

Note how following these recommendations improves the following theme statement:

Poor example

Our integrated design process, incorporating the lessons learned on all earlier generation aircraft engines, has resulted in an engine that uses four common fastening systems for engine assembly, offering maximum maintainability.

Too many features confuse the reader. Which ones are most unique? Most sellers would claim to have an integrated design process and to incorporate lessons learned.

Better example

Our engine uses four common fastening systems for maximum maintainability.

Now cut the jargon. Fastening systems are bolts; maximum maintainability means easy to fix.

Better example

With only four common bolts used for assembly, our engine is easy to fix.

Then put the benefit first.

Our engine is easy to fix because only four common bolts are used for assembly.

Save the proof for the section graphics and text. Do not try to incorporate complete proof in the theme statement.

Evaluators tire from reading long theme statements. High-impact theme statements resemble sound bites. If evaluators had to justify why you should be selected, what should they say? Draft selection justification statements for the evaluators in your theme statements.

With theme statements, a complete sentence is more likely to contain both features and benefits. Theme statements that are incomplete sentences too frequently contain only features or only benefits. Good theme statements enable the reader to answer both questions: “So what?” and “How so?”

One way to test your theme statements is to read them aloud. Most theme statements that sound good are good. We can actually tolerate reading longer theme statements than we can tolerate hearing them. If you have to take a breath when reading your theme statement, it is too long. Focus your thoughts and shorten your theme statements.

6 DIFFERENTIATE SECTION THEME STATEMENTS AND SECTION SUMMARIES.

Writers often create long theme statements that incorporate all of the key features and benefits discussed in the section. These long theme statements make better section summaries. Use them as the first paragraph in the section, then write a concise, focused theme statement.

Note how the following section summary is converted into a concise, specific, and focused theme statement.

Section Summary

All environmental waste cleanup services will be conducted by our 75-person team, centrally located in Omaha, Nebraska. Ima Green has successfully managed this team for 3 years, completing 22 clean-up actions on schedule and at or under budget. Team members are licensed to perform all action requested in the bid request.

Section Theme Statement

Ima Green's team has completed 22 cleanup actions for your organization during the past 3 years. All cleanup actions were on schedule and at or under budget.

To illustrate the difference between a section theme and a section summary, try the following two-part exercise:

1. Consider the place where you live. When you were looking for your current residence, you probably saw several places at the same price. Jot down the specific feature that prompted you to select the one where you live. Typical answers are location, space, the fireplace, large garage, fenced yard, it was bright and airy, or it just felt good.
2. Now write a one- or two-sentence description of the place where you live. Typical descriptions read like a real estate agent's description:

"The home is a 2,000 sq. ft. brick rambler with 3 bedrooms, 2 full baths, a full basement, located on a .25-acre lot near neighborhood schools."

Form a theme statement by linking discriminating features identified in part one to a benefit. The second statement is a summary. Emulate this in section themes.

7 ENSURE BENEFITS GO BEYOND ADVANTAGES.

Benefits are something that customers have acknowledged they want and value. Benefits are owned by customers. Advantages are potential benefits. Advantages sound good, but customers may not actually want them. In some instances, customers might value the advantage, turning it into a benefit, once they understand how it helps them.

Proposal writers cannot draft effective themes if they do not know what customers value. Consider the following examples:

You can economically commute to work with this new hybrid gasoline-electric auto, rated at 65 miles per gallon.

What if the customer is looking for an auto to race in weekend road rallies?

Your fitness will improve rapidly when you use the Pro Star programmable treadmill for only 20 minutes, 4 days per week.

What if the customer detests walking or running, lacks space to place a treadmill, lacks the initiative to work out alone,

or simply does not care about personal fitness? Then the treadmill offers this customer no benefit.

Organizations that use boilerplate extensively often have ineffective themes in their proposals. The benefits, while desirable, are often generic rather than specific and are not in the customer's terms.

Consider a proposal to provide a telephone system to a business. A typical proposal includes a list of 50 features of the phone system linked to the benefit of each feature. Many customers see no need for 80 percent of the features, so the system appears over-specified, complex, and more expensive than necessary. Many of the remaining 20 percent of the features are linked to benefits that are not particularly appealing or useful to the customer.

In an attempt to cover all aspects of their system, sellers unintentionally turn away customers.

See FEATURES, ADVANTAGES, AND BENEFITS.

8 TAILOR YOUR THEME STRUCTURE AND APPROACH TO THE EVALUATION PROCESS.

Proposal professionals advocate distinctly different standards for theme statements, usually because a particular approach has worked well in a specific market. All of the following approaches are used:

1. Place a single theme statement only at the beginning of sections, typically at a uniform indenture level.
2. Place a theme statement anywhere a significant discriminator is discussed.
3. Place a series of theme statements at the beginning of major sections in a single box.
4. Place a single theme statement at the top of every page.

Each approach has potential advantages and disadvantages, depending on how the proposal will be evaluated. Remember that having focused, persuasive content is much more important than the number of theme statements and the placement of those theme statements in your proposal.

The **first two approaches** are more effective in the less-disciplined, more-casual approach to evaluation common in many nongovernment market sectors. Short, concise theme statements are more likely to be read and remembered when the winner is being selected in a group discussion. The telling comment from an evaluator is likely to be something like the following: “I think we should go with Company A because they were the only ones that . . .” The evaluator’s justification usually mirrors a particularly effective, persuasive, and memorable theme statement.

The **first three approaches** effectively capture the attention of *skimmers*. Skimmers are usually senior managers who play a major role in the selection decision but are not assigned a formal evaluation role. Skimmers read only the parts that capture their interest.

See ACTION CAPTIONS; FEATURES, ADVANTAGES, AND BENEFITS; and HEADINGS.

Placing a single theme statement at the beginning of the section requires a writer to identify the single most important discriminator in the section and incorporate it into the theme

statement. The concept is correct, but the implementation is more difficult.

Placing theme statements anywhere a significant discriminator is discussed suggests the seller has numerous

The only difference between pull quotes and margin themes is whether the statement is identical to what is said in body text.

discriminators. If a theme statement directly answers a specific bid request question or requirement, the highly visible theme statement makes evaluation easy.

The risk in requiring theme statements at set points in a proposal is that writers might lack a discriminating feature, writers must draft more theme statements, and often these theme statements are not as focused and persuasive. Evaluators reading numerous theme statements are less likely to remember your major discriminators.

The third approach, placing a collection of themes in a single box at the beginning of a section, has advantages in complex, formally solicited proposals with a detailed, disciplined evaluation process. The example in figure 2 demonstrates this process.

Summarizing your response to the compliance requirements in a single place makes evaluation easy, potentially increasing your score. However, individual evaluators at the item level have minimal influence over the final selection. Evaluators with decision-making power tend to skim proposals and are less likely to remember anything said in a collection of themes. They are more likely to remember a single, concise statement.

The **fourth approach**, placing themes at the top of every page, is the least-effective choice. Evaluators tend to perceive themes at the top of the page as headers and ignore them. Writers forced to draft a theme for every page tend to draft ineffective, general, and less-persuasive theme statements.

Theme statements are things you say in the proposal to support your strategy. Writers have alternative devices to theme statements to emphasize their strategy in a proposal, specifically, informative headings, action captions, pull quotes, and margin theme statements. Each emphasis device is explained below:

- Informative headings are similar to themes, even if they do not incorporate both features and benefits.
- Action captions include features and benefits, but they can be longer than themes. The graphic seems to prompt people to eagerly read long captions when they refuse to read long themes.
- Pull quotes, often found in magazine articles, resemble themes. Pull quotes are literally quotes pulled from the text and displayed in a larger point size, often in the margin or with body text wrapped around them. Readers tend to remember items that are repeated and emphasized.
- Margin theme statements are often placed in page margins adjacent to where the point is supported, anywhere in a proposal section. Margin quotes are effective. Consider using them in all proposals.

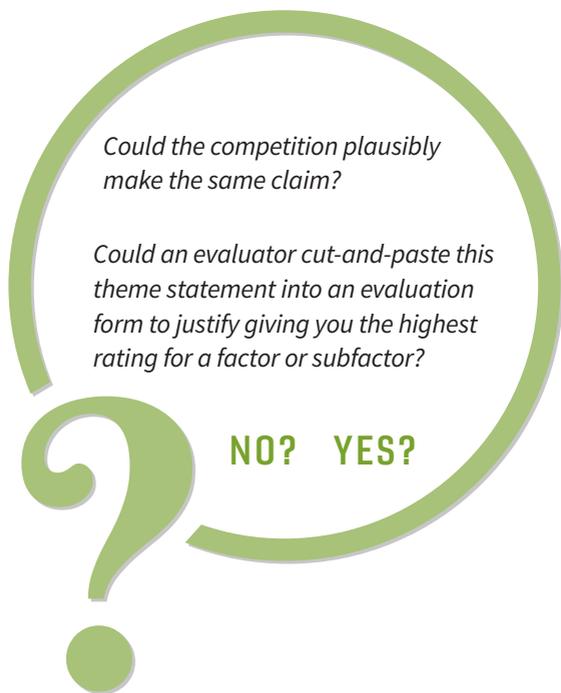
COMPLIANCE REQUIREMENT	THEME STATEMENT
INDICATE YOUR APPROACH TO SITE REMEDIATION	THE KLEAN TEAM WILL REMEDIATE EACH SITE IN A RAPID, COST EFFECTIVE MANNER BY:
Discuss cost-effective practices,..... job site safety,..... team structure,..... and how you will use subcontractors, if relevant.....	<ul style="list-style-type: none"> • Eliminating double handling of material • Loading trucks with identical material to eliminate decontamination • Limiting team size by assigning individuals qualified to handle several jobs • Using specialized subcontractors wherever they are available, qualified, and cost competitive

Figure 2. Limit Grouped Themes to Formally Evaluated and Solicited Proposals. Grouped themes reflect individual section compliance requirements. In this example, compliance requirements are listed on the left. The corresponding group theme is shown on the right. Grouped themes are typically placed at the beginning of a proposal section. A similar alternative is to place a benefit-feature matrix at the beginning of each proposal section that reflects the compliance requirements.

9 USE THE THEME LITMUS TEST TO ENHANCE THE IMPACT OF YOUR THEME STATEMENTS.

Chemists use litmus paper to quickly discriminate acidic and basic solutions. Writers can use the theme litmus test to quickly discriminate effective and ineffective theme statements.

Can you honestly answer “No,” then “Yes” to both of the following questions?



If not, then refine your theme statement. Try to make your feature more specific until it is unique. Then try to make the benefits more precise. Try to quantify the benefits.

While not foolproof, these questions can help you detect themes that require improvement. Eliminate jargon, slogans, and platitudes from your theme statements. Consider the following examples:

Poor

Elbonia Telephone has committed to partnering with the Elbonian Navy to assure success.

Improved

The Elbonian Navy can eliminate the cost of purchasing their own communications satellite by leasing encrypted and secure channels from the Elbonia Telephone satellite network.

Poor

Master Constructors is uniquely qualified to manage your project.

Improved

As the only company to ever construct a bridge of this type and length, we will assign the same project manager and construction superintendent to better ensure completion on time and within budget.