

Informal Letter Proposal

3x3
Writing
Process

Informal Letter Proposal

Read These

1 Prewriting

Analyze: The purpose of this letter proposal is to persuade the reader to accept this proposal.

Anticipate: The reader expects this proposal but must be convinced that this survey project is worth its hefty price.

Adapt: Because the reader will be resistant at first, use a persuasive approach that emphasizes benefits.

2

Research: Collect data about the reader's practice and other surveys of patient satisfaction.

Organize: Identify four specific purposes (benefits) of this proposal. Specify the survey plan. Promote the staff, itemize the budget, and ask for approval.

Draft: Prepare a first draft, expecting to improve it later.

3 Revising

Edit: Revise to emphasize benefits. Improve readability with functional headings and lists. Remove jargon and wordiness.

Proofread: Check spelling of client's name. Verify dates and calculation of budget figures. Recheck all punctuation.

Evaluate: Is this proposal convincing enough to sell the client?



1800 East Loop, Suite 950
Houston, TX 77027 | phone 713-226-1977
email: info@quintilesearch.com

May 30, 2018

Louisa Canto, D.D.S.
2002 Medical Plaza Dr. #300
The Woodlands, TX 77380

Dear Dr. Canto:

Uses opening paragraph in place of introduction.

Understanding the views of your patients is the key to meeting their needs. Quintile Research is pleased to propose a plan to help you become even more successful by learning what patients expect of your practice, so that you can improve your services.

Grabs attention with hook that focuses on key benefit

Background and Goals

We know that you have been incorporating a total quality management system in your practice. Although you have every reason to believe that your patients are pleased with your services, you may want to give them an opportunity to discuss what they like and possibly don't like about your office. Specifically, your purposes are to survey your patients to (a) determine the level of their satisfaction with you and your staff, (b) elicit their suggestions for improvement, (c) learn more about how they discovered you, and (d) compare your preferred and standard patients.

Identifies four purposes of survey

Announces heart of proposal

Proposed Plan

On the basis of our experience in conducting many local and national customer satisfaction surveys, Quintile proposes the following plan:

Divides total plan into logical segments for easy reading.

Survey. We will develop a short but thorough questionnaire probing the data you desire. Although the survey instrument will include both open-ended and close-ended questions, it will concentrate on the latter. Close-ended questions enable respondents to answer easily; they also facilitate systematic data analysis. The questionnaire will gauge patients' views of courtesy, professionalism, billing accuracy, friendliness, and waiting time. After you approve it, the questionnaire will be sent to a carefully selected sample of 300 patients whom you have separated into groupings of preferred and standard.

Describes procedure for solving problem or achieving goals

Analysis. Survey data will be analyzed by demographic segments, such as patient type, age, and gender. Using state-of-the-art statistical tools, our team of seasoned experts will study (a) satisfaction levels, (b) the reasons for satisfaction or dissatisfaction, and (c) the responses of your preferred compared to standard patients. Moreover, our team will give you specific suggestions for making patient visits more pleasant.

Report. You will receive a final report with the key findings clearly spelled out, Dr. Canto. Our expert staff will draw conclusions based on the results. The report will include tables summarizing all responses, divided into preferred and standard clients.

(Continued)

Includes
second-page
heading

Dr. Louisa Canto

Page 2

May 30, 2018

Uses past-tense
verbs to show that
work has already
started on the
project

Schedule. With your approval, the following schedule has been arranged for your patient satisfaction survey:

Questionnaire development and mailing	August 6-10
Deadline for returning questionnaire	August 20
Data tabulation and processing	August 20-22
Completion of final report	September 3

Staffing

Promotes
credentials
and expertise
of key people

Quintile is a nationally recognized, experienced research consulting firm specializing in survey investigation. I have assigned your customer satisfaction survey to John Carin, PhD, our director of research. Dr. Carin was trained at Emory University and has successfully supervised our research program for the past nine years. Before joining Quintile, he was a marketing analyst with T-Mobile.

Builds
credibility by
describing
outstanding
staff and
facilities

Assisting Dr. Carin will be a team headed by Lakeisha Huet, our vice president for operations. Ms. Huet earned a BS degree in computer science and an MA degree in marketing from the University of Florida. She supervises our computer-aided telephone interviewing (CAT) system and manages our 30-person professional staff.

Budget

Itemizes costs
carefully because
a proposal is a
contract offer

	Estimated Hours	Rate	Total
Professional and administrative time			
Questionnaire development	3	\$175/hr.	\$ 525
Questionnaire mailing	4	50/hr.	200
Data processing and tabulation	12	50/hr.	600
Analysis of findings	15	175/hr.	2,625
Preparation of final report	5	175/hr.	875
Mailing costs			150
300 copies of questionnaire			300
Postage and envelopes			5,275
Total costs			

Closes by
repeating key
qualifications
and main
benefits

Authorization

Makes response
easy

We are convinced, Dr. Cato, that our professionally designed and administered patient satisfaction survey will enhance your practice. Quintile Research can have specific results for you by September 3 if you sign the enclosed duplicate copy of this letter and return it to us with a retainer of \$2,500 so that we may begin developing your survey immediately. The rates in this offer are in effect only until October 1.

Provides
deadline

Sincerely,

Ronald Bridger
Ronald Bridger, President

RB:mem
Enclosure



Reality Check

What About Intellectual Theft?

"You may fear that revealing your ideas about how to solve a problem during the proposal process could result in clients taking those ideas and completing the project themselves. In rare cases, that may happen. But you'll have more success if you don't hoard your ideas."⁹

—Michael W. McLaughlin, *consultant and coauthor of Guerilla Marketing for Consultants*