TECHNICAL REPORT AND PROPOSAL WRITING

BACHELOR IN MANAGEMENT INFORMATION SYSTEMS

Professor: TOMAS DE LARA AGUILAR
E-mail: tdelara@faculty.ie.edu

Academic year: 17-18
Degree course: SECOND
Semester: 2º
Category: COMPULSORY
Number of credits: 3.0
Language: English

PREREQUISITES

SUBJECT DESCRIPTION

This subject will teach you the act of technical and proposal writing and current changes in the ways professionals must communicate. Communication duties are a critical part of most jobs. Survey after survey are revealing that every week people spend the equivalent of one or more days communicating, engineers report that they spend 34% of their time writing on the job. In my experience, the most critical skill required in today’s business world is the ability to communicate, both verbally and in writing.

Effective communication will have a direct impact on your potential in your career. This is why, technical communication and proposal writing is a large and important field of study and professional activity. You will learn how to empower readers by preparing them for and moving them toward effective action.

OBJECTIVES AND SKILLS

The objective of this subject is to create ongoing self-reflection so that the course become, so to speak, one big assignment in developing awareness of how each student writes and in creating confidence for the student in handling any future situation related to technical reporting and proposal writing. This will only be possible by practice and reflection. We will combine theory and practice in each class. Our main goal for me as a teacher and for you as students, will be working together in order to converting this class into a lab.

METHODOLOGY

<table>
<thead>
<tr>
<th>Teaching methodology</th>
<th>Weighting</th>
<th>Estimated time a student should dedicate to prepare for and participate in</th>
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<tbody>
<tr>
<td>Lectures</td>
<td>40.0 %</td>
<td>30 hours</td>
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<tr>
<td>Discussions</td>
<td>13.34 %</td>
<td>10 hours</td>
</tr>
<tr>
<td>Exercises</td>
<td>20.0 %</td>
<td>15 hours</td>
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<tr>
<td>Group work</td>
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<td>10 hours</td>
</tr>
<tr>
<td>Other individual studying</td>
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<td>10 hours</td>
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<tr>
<td>TOTAL</td>
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<td>75 hours</td>
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Published by IE Editorial
PROGRAM

SESSION 1 (FACE TO FACE)
- Teacher and students introduction
- Introduction to the subject
- Technical Communication Basics
  - What is technical communication
  - What counts as technical communication
  - Who creates technical communication
  - How important is technical communication
- Internet and interactivity
  - Technical communication is global
- Globalization and cultural awareness

SESSION 2 (FACE TO FACE)
- How to profile Audiences
  - Who is the audience
  - What are the audience’s demographic characteristics
  - What is the audience role
- Profiling:
  - Audience’s task
  - Audience’s Knowledge level
  - Factors that influence the situation
  - Creating audience profiles

SESSION 3 (FACE TO FACE)
The technical communication process
- Overview of the process
- Planning your document
- Drafting and revising your document
- Editing or finishing
  - Producing the document

SESSION 4 (FACE TO FACE)
Technical Communication style
- Sentence strategies
- How to write clear paragraphs for your reader
- Choose a tone for the reader

Researching:
- The purpose of research
- Questioning: The basic skill of researching
- Collecting information from people
- Collecting published information

**SESSION 5 (FACE TO FACE)**

Designing Pages:
- Using visual features to reveal content
- Using text features to convey meaning
- How to use color
- Developing a style sheet and template

Using visual Aids:
- Visual thinking
- The uses of visual aids
- Creating and discussing visual aids
- Using Tables
- Using Graphs
- Using Bar Graphs
- Using Pie Charts
- Using Charts
  - Troubleshooting tables
  - Flow charts
  - Gantt charts
  - Layouts
- Using illustrations

**SESSION 6 (FACE TO FACE)**

Describing:
- Planning the mechanism description
- Writing the mechanism description
- Planning the process description
- Writing the process description
- Planning the description of a human system
- Writing the description of a human system

**SESSION 7 (FACE TO FACE)**

Technical Communication applications:
- Sets of instructions
  - Planning the set of instructions
  - Writing the set of instructions
  - Field-testing instructions
- Informal reports and email
  - Basic strategies for informal reports
  - Types of informal reports:
    - IMRD reports
    - Brief analytical reports
    - Progress reports
    - Summaries and abstracts
    - Background or conceptual reports
    - Outline reports
    - Email

SESSION 8 (FACE TO FACE)
Technical Communication applications - The electronic environment:
  - Websites and social media from a technical reporting standpoint
    - Basic web concepts
    - Planning a website or web document
    - Drafting for screens
    - Testing

SESSION 9 (FACE TO FACE)
Technical Communication applications:
  - Formal reports
    - The elements of a formal report
      - Front material
      - The body of the formal report
      - End material

Job Application Materials:
  - The basic format of a letter
  - Elements of a letter
  - Analyzing the situation
  - Planning the resume
  - Writing the resume
  - Letter of application
  - Writing follow-up letters

SESSION 10 (FACE TO FACE)
Technical Communication applications:
- Recommendation and Feasibility Reports
  - Planning the Recommendation report
  - Drafting the Recommendation report
  - Planning the Feasibility report
  - Drafting the Feasibility report
- User Manuals
  - Planning the manual
  - Writing the manual
  - Test the manual

SESSION 11 (FACE TO FACE)
Proposal Writing:
- Introduction to Proposal writing
- What is a good proposal
- The value of proposals to the clients
  - Proposals as a means of influencing clients
- Main mistakes in Proposal Writing

SESSION 12 (FACE TO FACE)
Proposal Writing:
- Understanding Persuasion
  - The essence of client-based persuasion
- The structure of persuasion
  - The NOSE pattern of persuasive structure
- How to develop a client centered message
- Types of outcomes clients typically seek
- Customer Behavior
  - How people make decisions
- Creating a compelling value proposition
- The four personality types and their preferences
- Adjusting for level of expertise
- The decision maker´s Role and Values

SESSION 13 (FACE TO FACE)
Proposal Writing:
- Letter Proposals
- The structure and key elements of formal proposals
- Writing the business case
  - Executive Summary
- Public tenders, RFI’s and RFP’s
  - Persuasive answers to RFP questions
  - Simplifying the evaluator’s job
- Presenting evidence and proving your points
  - Writing effective case studies

SESSION 14 (FACE TO FACE)
Proposal Writing:
- Qualifying the opportunity
  - Is it a real opportunity?
  - Is it worth winning?
  - Can we compete?
  - Can we win?
- How to determine the appropriate level of effort
- An overview of the proposal development process
- The packaging is part of the product
- Presenting your proposal
- Tracking your Success
  - Implementing metrics to improve your proposal processes
  - Dealing with bad news

SESSION 15 (FACE TO FACE)
FINAL EXAM
BIBLIOGRAPHY

COMPULSORY

The reference textbook is:
- Technical Report Writing Today, Daniel Riordan, Publisher: Wadsworth Publishing
- Persuasive Business Proposals: Writing to Win More Customers, Clients, and Contracts, Tom Sant, Publisher: AMACOM

BUY YOUR BOOKS HERE

IE LIBRARY PERMALINK

Additional documents, including lecture slides, exercise sets, etc… will be posted on Campus Online throughout the semester.

EVALUATION CRITERIA

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Percentage</th>
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<tr>
<td>Class Participation</td>
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</tr>
<tr>
<td>Individual Work</td>
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<tr>
<td>Workgroups</td>
<td>15 %</td>
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<tr>
<td>Intermediate Tests</td>
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<tr>
<td>Final Exam</td>
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PROFESSOR BIO

Professor: TOMAS DE LARA AGUILAR
E-mail: tdelara@faculty.ie.edu

Entrepreneur, Speaker, Professor

Tomás holds a Bachelor in Physics (major in Computer Science) from the Complutense University of Madrid, a Master in Communications Software from “Universidad Politécnica de Madrid” and a Psychology of Peak Performance degree from Stanford University.

Tomás started his career holding engineering, sales and management positions at Oracle and Iecisa and, as a true entrepreneur, moved to the Silicon Valley, where he co-founded Secuware Inc.; he worked as part of the senior team to develop and execute the global strategy for the company, co-started international operations partnering with the EVP and other executives on leading the company, and increased revenues to position the company in Gartner’s Magic Quadrant 2007 & 2008.

During his time in the Silicon Valley, Tomás became an expert on Corporate Strategy and how to make information technology companies grow fast.

Back in Spain, Tomás joined Trend Micro, where he was rapidly promoted to General Manager for Spain and Portugal, transforming Trend Micro’s business in both markets.

However, in Tomás’ words, most exciting is his new career as a professor at IE, information technology companies advisor, professional mentor and public speaker.

OTHER INFORMATION
These are my contact details If you wish to set up a meeting with me in order to give you feedback or to respond any doubt you may have:

tdelara@faculty.ie.edu

620 99 20 43

**CODE OF CONDUCT IN CLASS**

1. **Be on time**: Students arriving more than 5 minutes late will be marked as “Absent”.
   Only students that notify in advance in writing that they will be late for a specific session may be granted an exception (at the discretion of the professor).

2. **If applicable, bring your name card and strictly follow the seating chart**. It helps faculty members and fellow students learn your names.

3. **Do not leave the room during the lecture**: Students are not allowed to leave the room during lectures. If a student leaves the room during lectures, he/she will not be allowed to re-enter and, therefore, will be marked as “Absent”.
   Only students that notify that they have a special reason to leave the session early will be granted an exception (at the discretion of the professor).

4. **Do not engage in side conversation**. As a sign of respect toward the person presenting the lecture (the teacher as well as fellow students), side conversations are not allowed. If you have a question, raise your hand and ask it. If you do not want to ask it during the lecture, feel free to approach your teacher after class.
   If a student is disrupting the flow of the lecture, he/she will be asked to leave the classroom and, consequently, will be marked as “Absent”.

5. **Use your laptop for course-related purposes only**. The use of laptops during lectures must be authorized by the professor. The use of Social Media or accessing any type of content not related to the lecture is penalized. The student will be asked to leave the room and, consequently, will be marked as “Absent”.

6. **No cellular phones**: IE University implements a “Phone-free Classroom” policy and, therefore, the use of phones, tablets, etc. is forbidden inside the classroom. Failing to abide by this rule entails expulsion from the room and will be counted as one absence.

7. **Escalation policy**: 1/3/5. Items 4, 5, and 6 above entail expulsion from the classroom and the consequent marking of the student as “Absent.” IE University implements an “escalation policy”:
   The first time a student is asked to leave the room for disciplinary reasons (as per items 4, 5, and 6 above), the student will incur one absence, the second time it will count as three absences, and from the third time onward, any expulsion from the classroom due to disciplinary issues will entail 5 absences.