EXAMPLE CONSULTING PROPOSAL TEMPLATE

About this template

A consulting proposal should provide the context, purpose, scope and timeframe of a specific project, service or program of work. It's sales pitch in written form used to outline the problem your prospective client is experiencing and positions you, or your firm, as the solution – or at least a tangible step towards it.

A proposal usually is offered after you've had some communication with the prospective client, and often after a strategy consult or exploratory call. If they've asked you for a proposal, that means they're potentially interested in working with you. Awesome!

The key things you need to make sure you're clear on before forging ahead is:

1. Is there an identified need? (This should have come out of your exploratory consultation call.)
2. Does the person have the authority to say yes to the proposal? (If not, who is this person or group responsible that the proposal should be aimed at?)
3. Do they have the budget to go ahead with the work? (And related to this, if it's a future need …)
4. What's the timeline for doing the work?

In the B2B world, most clients will request a proposal before officially signing up or contracting with you. The proposal is not necessarily your legal agreement (or 'letter of engagement' with all the terms and conditions). At this stage, the proposal may be really high level – a first stage - just to outline the proposed scope of work, deliverables and timeline, as well as your working relationship, to make sure you're aligned on what's needed, and how and when you will deliver it. And the cost – although sometimes proposals do not include full costings.

The procurement process of any particular organisation can vary, so they may have a pre-set proposal template they send you, that you mould your material to fit, and they may have thresholds and procurement policy specific things you need to comply with.

Generally, the bigger the organisation, the more hoops there usually are.

So this is more a template for the key information you need to have at your disposal for writing a proposal – and where the pieces fit the standard kind of structure these things usually take. It's unlikely this is a document of more than 6-8 pages, usually much shorter.

Let me know how it goes!

Jay Allyson

Dr Jacqueline Allyson Dempster
CEO Belanda Consulting & Education Services

YOUR LOGO

Company name, address, contact person

DATE: Date it will send

FAO: Your contact's title, name

Title:

Proposal by [Your Company] to Provide [Service/Program/Project Name] to [the Client]

Aims:

Write a few words here about the overarching vision for the service, project or engagement, such as "The proposal of work aims to" or "The intention of this partnership is to...."

Challenges:

What are the top 1-3 (no more) problems, pain points, frustrations and mitigations the client has approached you to resolve? Be specific based on your communication/conversations so far. Include the financial or tangible cost as well as any intangibles or longer term benefits you have identified together.

Desired Outcomes:

What does the client want to be, do or have? What are their goals, and what are the benefits of achieving them? Again, it's important to talk about both tangible and intangible outcomes and to consider benefits and impact across the organisation. I like to set it out as a logic model or matrix…

- What are the short, medium and long term gains?
- Who are the beneficiaries, direct and indirect, such as other stakeholders?

Value for Money:

I like to include a section on value for money where you set out some of the cost-benefits and price anchoring arguments. You want to recap the total value the client will be getting from your work together: all the tangible and intangibles outlined in Desired Outcomes.

Here, you can also include how these will be measured (what we call benefits realisation: outputs, outcomes and emerging indicators of impact is a good framework for change and transformation work).

In some proposals, you may want to benchmark the cost of the problem or the cost of inaction, in addition to the benefits/gains they get from solving it, to anchor against the investment they'll make.

Scope:

This section provides the high-level view of what work will be undertaken as a summary of what has already been discussed, to get their agreement on the main strategy. List 1-3 main activities you'll do for the client with enough explanation that they link it to what you discussed in your consult call.

Here is not the place for setting out propositions of potential things you could do, but what you will actually do, what's included. And if you want to be super clear, you might also list what's not included or 'out of scope'.

Deliverables:

It's a good idea to include here any immediate 'joint responsibilities – what you are responsible for delivering, but also what the client needs to do to ensure you can complete the work – such as providing documentation or making key staff available.

Although we usually put this into our terms and conditions in the letter of engagement, it's worth stating up front to manage expectations and exert a little leadership into the process.

High Level Plan:

I like to include a project plan, again high-level but include the key milestone stages.

Timeline:

This is setting out the earliest start date and latest completion date – that is both what you can deliver and what's the client's preferred timeframe. Again, this is something you should aim to get clear on in your exploratory call if you can. Because if you don't define this, or if it's non-urgent for the client, getting a decision can drag out and you'll be chasing them around for a response to your proposal.

Budget:

This is where you can set out the 'value for money' element of the proposal.

For purely consulting projects, I like to show the project milestones as key deliverables / outcomes and set a cost to each and then provide a total.

If you're delivering a training, you're best to cost it per group/cohort and set the minimum number of participants based on program design/group experience. You can offer a reduction on additional participants on a per person basis. This ensures that if you agree 10 and they give you 6, you still get paid the same.

You'll want to separate out consulting costs from other costs, such as expenses for travel, equipment. And sometimes it's useful to show the proportion of admin/project management separate from technical specialist time. It gives more transparency to how you come up with the figure.

Depending on the nature of the proposal and whether it needs to fit a formal procurement process, you may be asked to give details of the team delivering the work, their CVs/experience and the number of days / time they're involved in each stage.

Sometimes it's useful to separate out the hours for doing the work from meetings or admin time, but generally if you're not asked to do that kind of delineation, I wouldn't go there.

My approach is if they don't ask for any kind of breakdown, don't give any. It builds some flexibility into it once the proposal is approved (That's especially important if the timeline shifts and key people you'd included are no longer available!)

If you charge VAT, you will need to show this as separate, since for those clients who are VAT registered it will reduce the perceived cost since they can offset this in their VAT returns. (In the UK, HMRC will offset the amount you are charged against the VAT you owe from making sales of your own.)

Next steps

Here I like to end the proposal with excitement and confidence about what's possible should this program or work / training / service be implemented, and say how I'm looking forward to working with you [their name and/or the team], and [the organisation/company].

It's also a space to add in what you want them to do next, how to get back to you with questions and/or a decision. You may want to guide them to a timeframe for responding. (Some even go as far as to say this proposal is valid for X number of days!)