Proposal Advice From Seasoned Consultants

Idea In Short

Write proposals as stories where the client is the hero. Start with the problem, dollarize the value, keep it concise and negotiate fees with confidence because the client already wants you.

Proposals Are the Lifeblood of Professional Services

Proposals are the lifeblood of any consulting firm. Peter Drucker said the purpose of business is to create a customer, and in professional services this is easier said than done. Customers rarely know with clarity what they want, who they should choose, how long it will take or what success looks like. Their decisions are driven by time constraints, fear and budgets. A consulting proposal is a statement of intent describing what, why, how, when and at what cost will be delivered to solve the client problem. It should cover the cover page, introduction, scope of work, deliverables, methodology, workplan and budget. 1

It Is a Story and the Client Is the Heroine

One seasoned consultant offers rules learned the hard way. A proposal is a story, not a brochure. The hero of the story is the buyer, not the seller. A compelling story needs a great villain that drives the action. Use the buyer's words and take great notes throughout the conversation. The proposal should resonate with the buyer so they feel motivated to act. This narrative approach engages the client emotionally and intellectually. The villain represents the business problem, and the consultant arrives as the trusted guide who helps the hero overcome it.

Keep It Simple and Direct

Clear and concise wins the day, often. Keep the proposal short because most buyers lack time for pages of detail. Make the benefits, objectives and deliverables completely clear. The content should be succinct enough that the client could copy and paste it into their internal business case. Create great content rather than great slides. PowerPoint presentations annoy corporate audiences, so distill good content into a small number of slides. This entices the client enough for a conversation where you sell the story without a lengthy deck. The executive summary is critical and must stand alone, because it may be the only thing the client reads.

The NOSE Framework and Bottom Line Up Front

One consultant recommends the NOSE framework: need, objective, solution and evidence. The approach emphasizes why before what, and what the client receives before how. For services, people buy people, so the proposal must inspire trust and competence. The bottom line up front principle reinforces this. The executive summary comes first and may be the sole section the client reviews. Another consultant suggests presenting a handful of options based on data insights, supported by appendix pages that build credibility without cluttering the main narrative. The main proposal tells the story, while the appendix proves you can execute it.

Start With the Problem and Dollarize It

Start with the problem. What is the client's situation and context after your meetings and conversations? Have you taken good notes and narrowed down the issue? Consultants help clients get to yes and give them the credit for success. One reviewer currently evaluates proposals from firms and notes that many focus on what they want to sell rather than what the client needs solved. The strongest proposals identify the client's pain and address it directly. Do not offer a Rolls Royce when the client needs a Toyota. Understand the client's needs thoroughly from multiple stakeholders and dollarize the cost-benefit to make it super clear. Describe the client's pain better than they can themselves. 2

Make Generic Offerings Bespoke

Clients do not want walking generalities or copy-paste best practices, because they can produce those themselves. Consultants have many exit opportunities, and ex-consultants populate client organizations throughout. They know all the tricks, so be earnest and do good work. A consultant who moved from strategy consulting into industry notes that a poorly thought-through response is worse than a polite decline. General discussions should be highly tailored to the specific situation. If you have a generic offering, make it bespoke so the client understands exactly why it will be useful for their company. Customization signals that you listened and understood their unique context.

Demonstrate Credibility Through Methodology

Your action plan, methodology and hypotheses should demonstrate credibility. Show what you would look at, the usual issues in the industry and the symptoms with possible root causes. Include credentials from similar work performed previously, with notable client names where possible. Present the core team with their curricula vitae and any prior experience with this client. Credibility is not about boasting but about providing evidence that you can deliver. The client needs assurance that their investment will produce results, and your methodology section is where that assurance takes shape.

Get Them Excited to Buy

Convert programs of work into visual diagrams that make timelines, milestones and resource peaks easy to understand. Ensure the client knows exactly what to do next through a clear call to action. Be hypothesis-driven and share initial insights and observations. Get the client comfortable with your workplan and show illustrative examples of deliverables. Include a list of other ideas that might benefit them as a subtle value-add. A creative look and feel works when the proposal does not go through formal procurement. The goal is to build excitement and momentum toward a signed engagement.

Negotiate Fees Harder

One piece of feedback is particularly thought-provoking for experienced consultants. If you reach the stage of negotiating fees, scope, resources and time, the client probably wants you. If you were an order of magnitude too expensive, the detailed negotiation would not happen. Therefore, be tougher at this point because you are already wanted. Many consultants discount prematurely out of fear, undermining their own value proposition. The client has signaled preference by engaging in detailed negotiation, which means you have leverage. Use it wisely and confidently rather than collapsing at the first sign of price pressure.

Persevere to Keep Your Foot in the Door

Finders want to book business today, but client timelines often differ. Consultants describe projects they closed after four or five years of cultivation. Sometimes the timing is simply not right. Business-to-business purchases involve scoping, budgeting and committee approval, so expect the process to take time. Persevere to keep your foot in the door if there is a sniff of interest. Keep knocking at increasing intervals over months or years, but only if you already have a foot in the door. A partner at Deloitte often said to look for unfair fights. Do not respond to blind requests for proposals where you lack connection, proprietary insight or advantage. Concentrate your efforts where you have some edge. 3

- 1PSOhub on Creating Compelling Proposals
- 2Harvard Business Review on Writing Winning Proposals
- 3McKinsey on Winning Consulting Proposals

Summary

Winning proposals tell a client-centered story with a clear villain, bespoke solutions and a bottom line up front. Dollarize the value, demonstrate credibility through methodology and persevere through long sales cycles. Play the games you are more likely to win.