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Sales Proposals 101

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Summary

- * A consulting proposal improves your odds of closing the sale.
- * Describe the client's need and your solution in detail.
- * Quantify the value of your contribution and price accordingly.

You've had an initial conversation or two with a potential consulting client, and things seem to have gone well. The client knows he has a need, and you know you've got the chops to provide the solution. Since you've already had a meeting of the minds, why must you spend time and effort putting together a written proposal?

Because the problem and solution are complex, even though the value proposition is simple. Add to that the fact that memory (including your prospect's) is short, and your contact may not be the only person who needs to approve your project. Putting something in writing improves the odds that you'll land the business.

Now that you've heard the wind-up, you're ready for the rest of the pitch.

The Anatomy of a Proposal

Although sales proposals vary, most successful ones share key elements and a mode of organization. Independent consultants proposing relatively small projects can usually get the job done in two to five pages. Here's what a business consultant's proposal should look like:

Client Background

Start by showing that you know where the client is coming from. Describe the internal and external forces driving the client's industry right now. Demonstrate your knowledge of the client's business, but not by pasting in a generic company description that you've copied from some business Web site. Show some insight.

Client's Need or Opportunity

This is the first part of the heart of your proposal. What untapped market is the client ignoring? What avoidable cost is taking a bite out of profits? How could technology further streamline operations? More than ever in these lean times, you need to get quantitative here to demonstrate the opportunity's magnitude.

Your Solution

This is the second part. Explain what you would do to meet the client's need or help the company exploit the opportunity. Describe the benefits you would provide to the client. Explain why your approach is superior to all others, keeping in mind the strategies that rival bidders are likely to offer. Give specific examples of how your solution will work, but don't give away the store by defining every aspect of your plan.

Implementation

Lay out the project schedule and deliverables in detail. Describe what you will do and what the client will need to do to move the project from one milestone to the next. Be specific about the hours, personnel and resources that will be required to accomplish every task. This is the section where you will either convince the client that you know how to manage a project, or you'll lose the business.

Your Background

Make the case that you have the all-around best qualifications for the job. Resist the temptation to create a boilerplate background section and use it in each proposal, unmodified. Instead, create a master background, including all your past and present clients, accomplishments, credentials and so on. Then for each proposal, whittle the master down to a background section customized for the client.

Fees and Invoicing Schedule

Having detailed the client's ROI (return on investment) in the solution section, you should feel confident to set your fees according to the value you bring, not what you might think your time is worth. Itemize costs of hardware, software or other products or services you will provide directly or through subcontractors, plus travel and

other reimbursable expenses. Spell everything out now, including when you will invoice and for how much, to avoid disagreements later.

Are you ready to drop the proposal in the mail? Save the stamp and deliver it in person if possible. This small investment of face time will help focus your client's attention on you and your winning proposal.