

Four Essential Ingredients of Successful Consulting Proposal



“We chose NBDC from among five candidates because of the breadth and depth of their expertise.” —CEO, health services company

I have been writing proposals addressing organization development needs for over 20 years. Since taking the lead at NBDC’s Professional and Organizational Development group, we have increased revenues by 42%. Much of that success can be attributed to improvements in the way we approach proposals for customers that reflect their needs (the what) and fit their culture (the how). Though I write proposals as an external consultant, the key elements I use are effective for internal proposals too.

This paper will describe the key elements that must be addressed in order to craft a successful written proposal for consulting projects:

1. Cover Letter
2. Statement of Need
3. Implementation Plan
4. Value Proposition

1. COVER LETTER

I know it sounds rudimentary, but the first place to communicate to the customer that you listened and care about their success is with the cover letter. Though brief, the cover letter must address at least these three things:

- **Appreciation**
- **Understanding**
- **Differentiation**

Be sure to thank the customer for the opportunity to submit your plan while giving them a sense that you understand their circumstances and what could happen if their need goes unaddressed. Conclude with what sets you apart from others from whom they may be seeking input.

2. STATEMENT OF NEED

This is where you demonstrate that you have excellent listening skills. Having thoroughly prepared in advance of the sales meeting and successfully concluding the meeting, the statement of need gets specific about what was discussed. At a minimum, it addresses:

- **An accurate description of the organizational context in which the need is presented**
- **A compelling sentence or two about the primary pain point**
- **A compelling sentence or two about what happens if the pain remains**
- **Basic details of the target audience and timeframe for delivery**
- **A clear picture of what success will look like using vernacular of the customer**

The statement of need becomes a case study and sets up the story in a way that is objective and complete. The story must be compelling and written from the perspective of the customer and what they stand to gain.

3. IMPLEMENTATION PLAN

Here is where you describe what you plan to do to close the gap and address the need. The important thing to remember in this section of the proposal is to be clear why your approach is best and how it specifically addresses their need. If you are recommending a focus group, why? If a survey, why? If training, why? How does your recommendation increase the chances of success for them? Why is your approach appropriate now and not after something else is attempted? Set this narrative before outlining the specific steps or content or curriculum.

The content of your plan should directly respond to the information the customer has provided you so far. Indicate that your plan is a working document and can be further refined based on additional conversation. Be certain to delineate roles and responsibilities among you and the customer.

4. UNIQUE SELLING PROPOSITION (AKA VALUE PROPOSITION)

In addition to listing the biographies of your experts and a list of past customers, insert those items that provide value to the customer. Avoid features. Focus on how what you know and how you do business differ-

entiates you from others in the market.

Without these four key elements, I believe, you lessen the odds that your proposal lessens it odds will be selected. According to Global Industry Analysts, Inc. (GIA), HR outsourcing remains strong with an expected combined global market of almost \$54 billion by 2020. Your successful proposals may give you the power to participate in that marketplace.

About the author

Harold Sargus, MBA, SHRM-SCP, SPHR, Lean Certified, has 25 years of successful human resource, organization development and consultative sales experience. He served as the lead HR professional within the nonprofit, manufacturing and construction sectors and



created an HR department. He has consulted with a variety of organizations, including manufacturers, healthcare organizations and service organizations. Harold has managed projects involving HR audits, process improvement, leadership development and applied research. Harold leads the Professional and Organizational Development team within NBDC.

Contact Sargus at (402) 554-4088 or hsargus@unomaha.edu for more information about how NBDC can help you develop your organization.

About the Nebraska Business Development Center

NBDC is a cooperative program of the U.S. Small Business Administration (SBA) and the College of Business Administration at the University of Nebraska at Omaha (UNO). NBDC partners with the University of Nebraska at Kearney, Southeast Community College, Wayne State College, Mid-Plains Community College and Chadron State College to provide consulting and business support services from offices in Omaha, Lincoln, Kearney, Grand Island, North Platte, Wayne, Scottsbluff and Chadron.



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