



# Example Proposal Storyboard





## Structure your proposal to tell a story based on client questions



"Who's going to be doing the work? Are they qualified?"

Section 6 - Staffing



"What do we provide?"

Section 7 – Client Role



"What can we expect"

Section 8 - Deliverables



"How much will this cost? What's the pay off / return?"

Section 9 – Commercial and Benefits



"What happens next?"

Section 10 – Why us? Closing / Next Steps



Appendices

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Section 1  
Salutation / Today's Objectives

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"What's this document  
/ presentation about?"

What's in it for me?"

## Section 1

# Salutation / Today's Objectives



### Purpose:

- To establish comfort and support
- To capture their interest



### Focus:

- The Client ("Thank you for meeting us..."  
"It was a pleasure meeting you...")

## Section 1

### Salutation / Today's Objectives



#### **Messages:**

- "We're responsive"
- "We're collegial"



#### **Tone:**

- Interest, enthusiasm, personal



What's this document / presentation about?  
What's in it for me?





# Section 1

## Salutation / Today's Objectives



### Content:

- The purpose and objectives of the document /presentation
- Proven Client results and potential benefits to Client
- The structure of what is to follow



### Links:

- Situation, complication, steps to resolve
- Table of contents

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## Section 2 The Background

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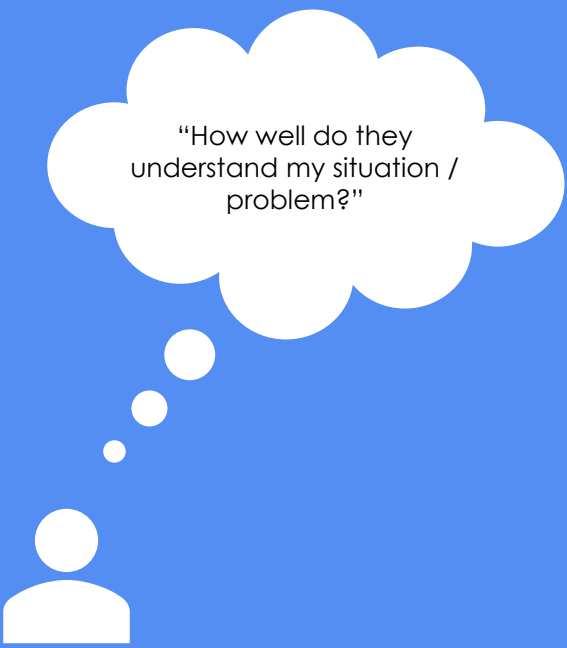
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"How well do they  
understand my situation /  
problem?"

## Section 2

# The Background



### Purpose:

- To briefly summarise the Client's situation
- To reassure the Client that you know their business and have listened



### Focus:

- The Client's business position, the problem ('SC' out of 'SCQ')

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## Section 2

### The Background



#### **Messages:**

- “We understand your industry, your business, your problem”



#### **Tone:**

- Factual, to the point, competent



How well do they understand my situation / problem?



## Section 2

### The Background



#### Content:

- The Client's industry, their organisation's current position (based on Client and identified secondary sources)



#### Links:

- “You have therefore asked to propose...”

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## Section 3

# Objective and Critical Success Factors (Scope)

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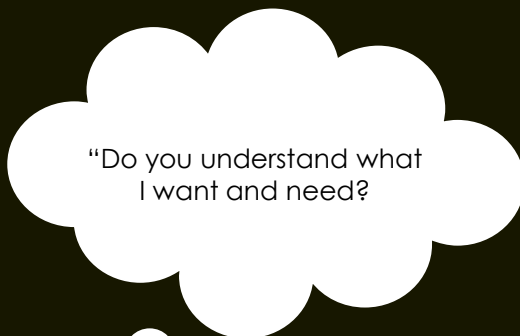
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## Section 3

# Objective and Critical Success Factors (Scope)



### Purpose:

- To clarify the objective(s) for the assignment



### Focus:

- Scope of investigation / work
- What the assignment will achieve

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## Section 3

# Objective and Critical Success Factors (Scope)



### Messages:

- “We understand what you want to achieve”
- “We understand what’s critical”



### Tone:

- Purposeful, confident

Do you understand what I want and need?

## Section 3

# Objective and Critical Success Factors (Scope)



### Content:

- Specific, measurable, realistic statements which represent the agreement you have reached



### Links:

- "To achieve these objectives we have identified a [3 phase] approach..."

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## Section 4

### Challenges and Value Proposition

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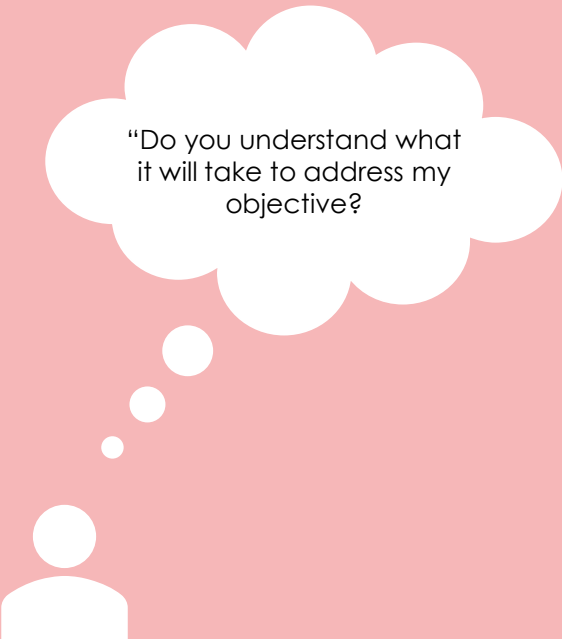
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"Do you understand what  
it will take to address my  
objective?"



## Section 4

# Challenges and Value Proposition



### Purpose:

- To explain the challenges and questions to address and how you will tackle the challenges associated with the objective



### Focus:

- Analytical capability, 'expert hunches' and evidence of capability

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## Section 4

# Challenges and Value Proposition

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### Messages:

- “We understand your challenges and have the expertise and intellect to answer the right questions”



### Tone:

- Thoughtful and practical

Do you understand what it will take to  
address my objective

## Section 4

# Challenges and Value Proposition



### Content:

- An outline of the main (known or potential) issues



### Links:

- “Our approach can be summarised as a series of work tasks...”

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## Section 5 Approach and Work Plan

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## Section 5

# Approach and Work Plan



### Purpose:

- To explain the key activities involved in the assignment
- To establish competence to deliver the project



### Focus:

- The task

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## Section 5 Approach and Work Plan



### Messages:

- “We think of the details, we plan ahead”



### Tone:

- Practical



### Links:

- “The achievement of this work plan will be under the overall responsibility of...”

How will you tackle this? What will you actually do?



## Section 5

# Approach and Work Plan



### Content:

- An overview of the approach (e.g. productivity improvement, business process improvement)
  - Clarified into a sequence or steps or phases
  - With a rationale for each
- A step by step comparison between approach steps and key activities

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Section 6, 7 and 8  
Staffing, Client Role and  
Deliverables

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"Who?"  
"My role?"  
"What do we get?"



## Section 6, 7 and 8

### Staffing, Client Role and Deliverables



#### **Purpose:**

- To sell the consultant team / the firm
- To clarify the timescale of the assignment
- To specify costs



#### **Focus:**

- The practical parameters of the assignment

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## Section 6, 7 and 8

### Staffing, Client Role and Deliverables



#### Messages:

- “We are an established firm with competent, qualified people”
- “We can meet your timescale”
- “Our fees are based on estimated time spent”



#### Tone:

- Unapologetic



#### Links:

- “We believe this project / the recommendations deriving from our study will have a significant effect on...”



Who? My role? What do we get?



## Section 6, 7 and 8 Staffing, Client Role and Deliverables



### Content:


- Summary statement of the firm's experience, consultants' experience and outline of proposed role in the assignment (expanded in Appendix)
- Staffing commitment from Client's organisation (as appropriate)
- Overall timing of assignment (expanded with GANTT charts, PERT charts in the Appendix, if necessary) and any key messages / decision points
- Fees, expenses (what is included, likely percentage of fees), billing terms







Section 9  
Commercials and Benefits  
(Value)



"What's the cost?  
What's the pay off / return?"

## Section 9

# Commercials and Benefits (Value)



### **Purpose:**

- To establish the costs and tangible and intangible benefits of the assignment



### **Focus:**

- The Client's return through working with us

## Section 9

### Commercials and Benefits (Value)



#### Messages:

- “We share a common goal; this will be worth doing and good value”



#### Tone:

- Positive and based on historical records / personal experiences – not “salesman”



#### Links:

- “Our experience of similar assignments indicates that those outcomes are both realistic and achievable and we are confident...”

What's the cost? What's the pay off / return?

## Section 9

# Commercials and Benefits (Value)



### Content:

- Clear outline of fees and expenses (no ambiguity)
- If fixed price be clear exactly on what is in and out of scope
- Tangible benefits e.g.;
  - Reduced costs (target for identification, typical savings achieved), increased sales, improved cashflow
  - Improved productivity, improved quality, faster processes, etc
  - Reduced time to market
- Intangible benefits e.g.;
  - Improved communications, better management control, enhanced skills, more accurate management information, reduced risk, improved morale, clear direction, etc.





Section 10  
Closing / Next Steps

"What happens next?"





## Section 10

### Closing / Next Steps



#### **Purpose:**

- To take control of the next step in the selling process



#### **Focus:**

- Relieving the Client of the worry about the problem

## Section 10

### Closing / Next Steps



#### **Messages:**

- “We’re enthusiastic and interested”
- “Your assignment is important”



#### **Tone:**

- Personal, conversational



What happens next?



## Section 10

### Closing / Next Steps



#### Content:

- Offers of further help
- Detail of next contact
- Availability for Client to contact to ask questions - "We look forward to working with you on this important assignment"





## Appendices

## Structuring the proposal



### **Purpose:**

- To offer more detail on selected aspects of the proposal
- To enable different readers to select the level of detail they require



### **Focus:**

- Creating credibility



### **Tone:**

- Neutral

# Structuring the proposal



## Content:

- Firm's statement of experience
- Individual consultants CVs
- Details of timing and project planning
- Terms and conditions of business
- Client references / reference points
- Articles written by consultants on the subject, etc.

## Appendices







## Proposal Evaluation Checklist

## Approach

- Does the proposal represent a unique, imaginative approach?
- Are there any apparent discrepancies or omissions?
- Is it clearly demonstrated that top-level management will maintain a high level of interest and assume responsibility for the successful accomplishment of the programme?
- Has the proposal writer responded with an appropriate technique or is he or she trying to fit the problem to a favourite technique?
- How useful or capable of implementation will the end product be?





## Work Plan

- Has the work schedule been specified clearly, and is it realistic in terms of time and money? Does it fit with available personnel?
- Are effective review, evaluation and control provided at specific checkpoints?
- Are the various technical phases of the project detailed and realistically scheduled?
- Are the submission of progress reports and presentation of interim briefings required? What progress reports and interim briefings are planned?
- What degree of direct consultant-Client liaison is proposed? Is it appropriate?
- When the project is completed, how does the consultant intend to hand over the project?
- What degree of follow-up and/or debriefing is proposed? To whom do the relevant data belong and what happens to them when the project is completed?

## Timing

- Does the proposal show that the delivery schedule will be met and how it will be met?
- Is the planned use of facilities, such as document production, printing, data processing etc realistic?
- Does the timing 'fit' with Client expectations and requirements?



## Deliverables

- Are we addressing the Clients needs?
- Have we focused on the right deliverables?
- Can we achieve the right deliverables?



## Benefits

- Are the benefits clearly defined and articulated?
- Are the benefits quantified?
- What benefit tracking mechanisms are proposed?
- Who will be responsible for benefit tracking, especially once consultants have gone?



## Closing

- Are the proposed next steps appropriate?
- Does the closing leave the audience with a positive and enthusiastic frame of mind?





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