



**Send Me a Proposal:
Winning Strategies for Consultants**

Presented by Michael McLaughlin

Winning in Technology Consulting Services

Session Focus



- **Market Leadership**
- **Flawless Delivery**
- **Sales Mastery**
- **Operations Excellence**
- **Performance Management**
- **Reinvention and Renewal**

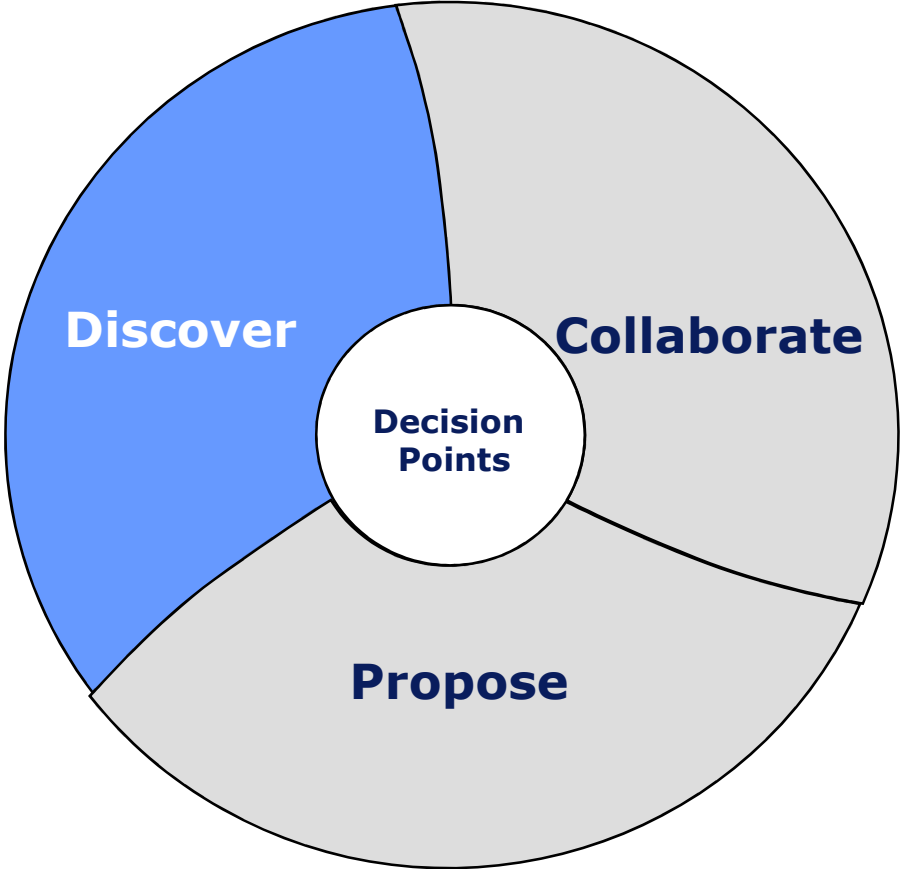
Session Takeaway

Most Consulting Proposals Should Never Be Written.

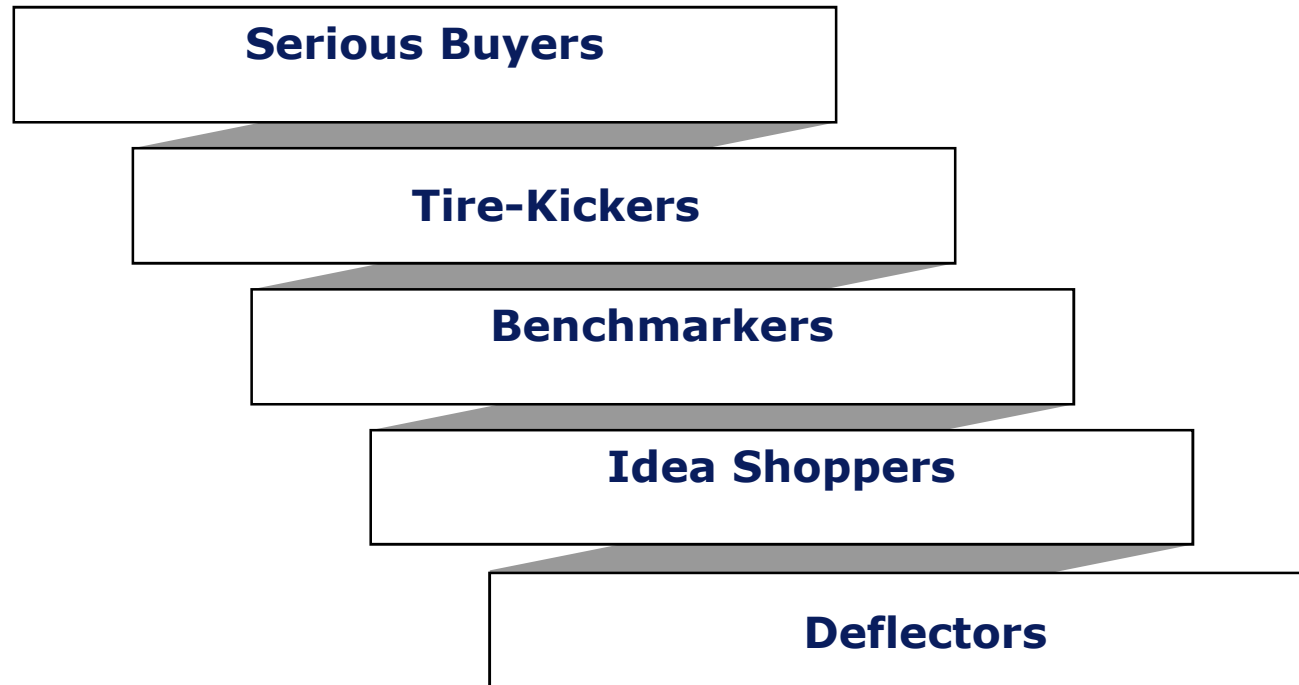
Proposal Reality Check

The Proposal Itself Is Rarely the Deciding Factor in Winning the Work.

A Simple Proposal Management Framework



Invest Time Early in the Sales Process to Find Serious Buyers



Proposal Reality Check

*Do the Discovery Work Right, and
Your Proposal Will Write Itself.*

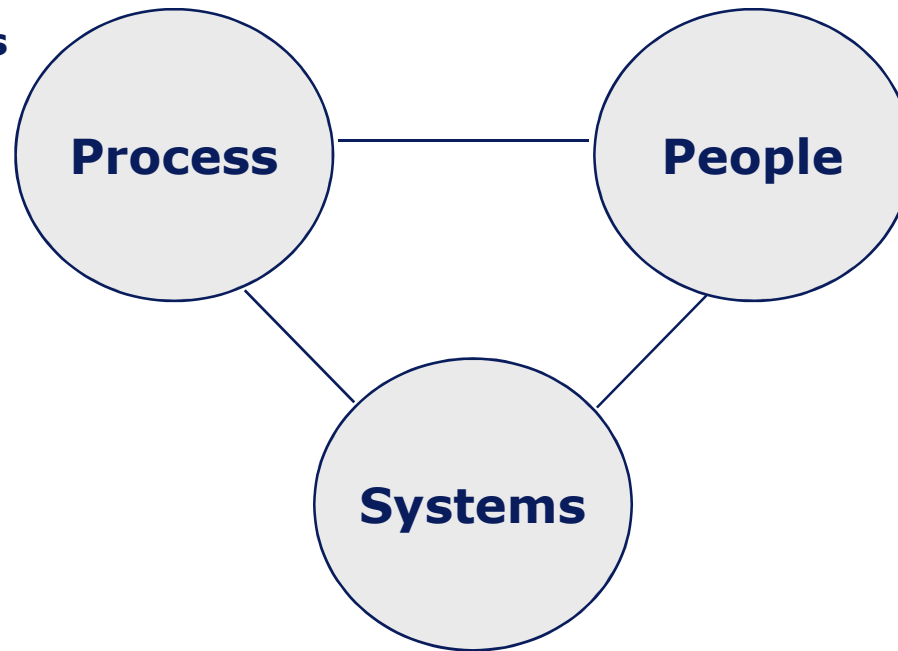
Questions to Ask the Client During the Proposal Process

Key Questions	Assessment
What's the imperative for this project?	Competitive, strategic, internal, regulatory
What are the implications if this project isn't completed now?	Urgent, important, or nice to have
What is driving the need for this project?	Symptoms and root cause
How would you describe the scope of this effort?	Boundaries and constraints
What part of this project do you expect to be easiest?	Often the most difficult
What part of the project do you expect to be the most difficult?	Organizational barriers
Have you tried this project before? If so, what were the results?	Risk
What are the obstacles to completing this project?	Schedule, budget
How will you measure success?	Ability to determine results and satisfaction
What is the ideal arrangement for someone to help you with this project?	Client expectations
How would you propose working together?	Team
How will you make the decision to award the project?	Competition

It's Common to Misdiagnose the Root Cause of a Client's Problem

Areas for Analysis

- Performance
- Integration
- Education
- Suitability
- Support



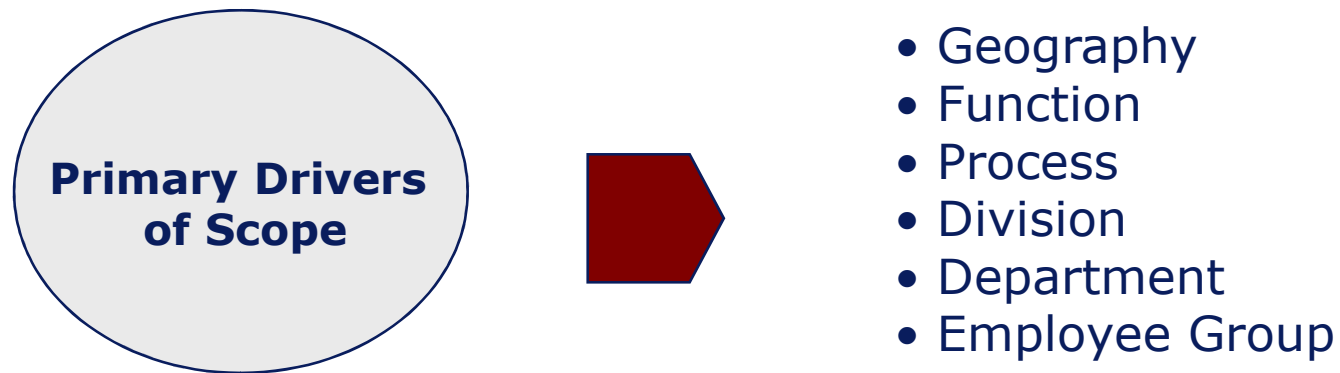
Areas for Analysis

- Customers
- Employees
- Suppliers
- Competitors
- Stakeholders
- Regulators

Areas for Analysis

- Responsiveness
- Integration
- Knowledge
- Stability
- Support

Project Scope Is Often Narrower Than Problem Scope

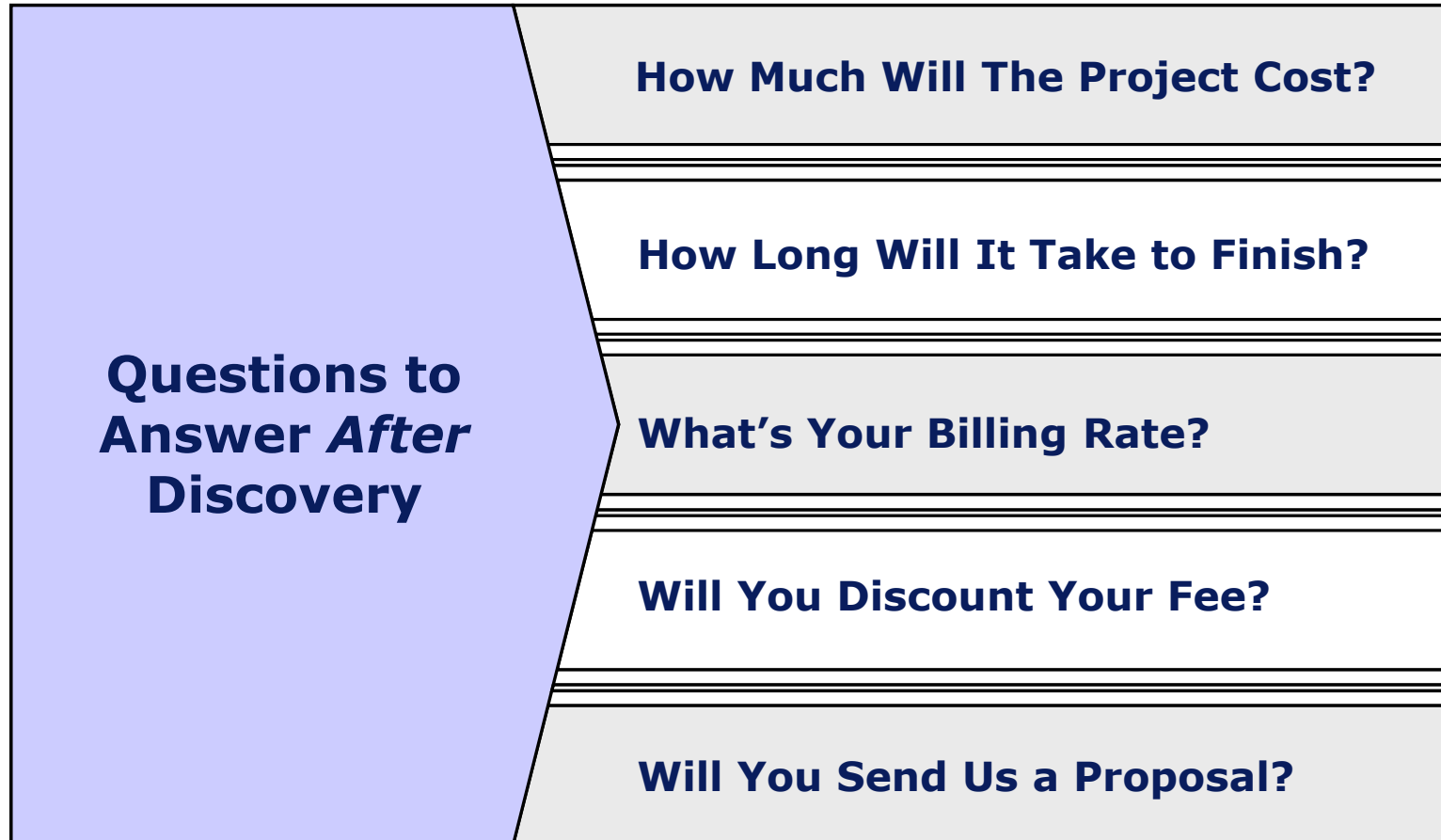


Small Oversights in Defining Scope Lead to Large Errors in Proposals.

Proposal Reality Check

Expect the Decision Process and Consultant Selection Criteria to Shift as the Sales Cycle Progresses.

FAQs During the Discovery Process



Clarify Expected Results before Agreeing to Anything

A Fuzzy Statement of Desired Results Will Lead to a Fuzzy Proposal.

Qualification Checklist

Key Questions	Response
Are you qualified to do the work?	
Is the project funded?	
Will the project be profitable?	
Is the client ready to start?	
Is the schedule realistic?	
Do you have access to decision makers?	
Does the business case make sense?	
Has the client used consultants before?	
Is the client executive team supportive?	
Does the client understand the project thoroughly?	
Do you understand the project thoroughly?	

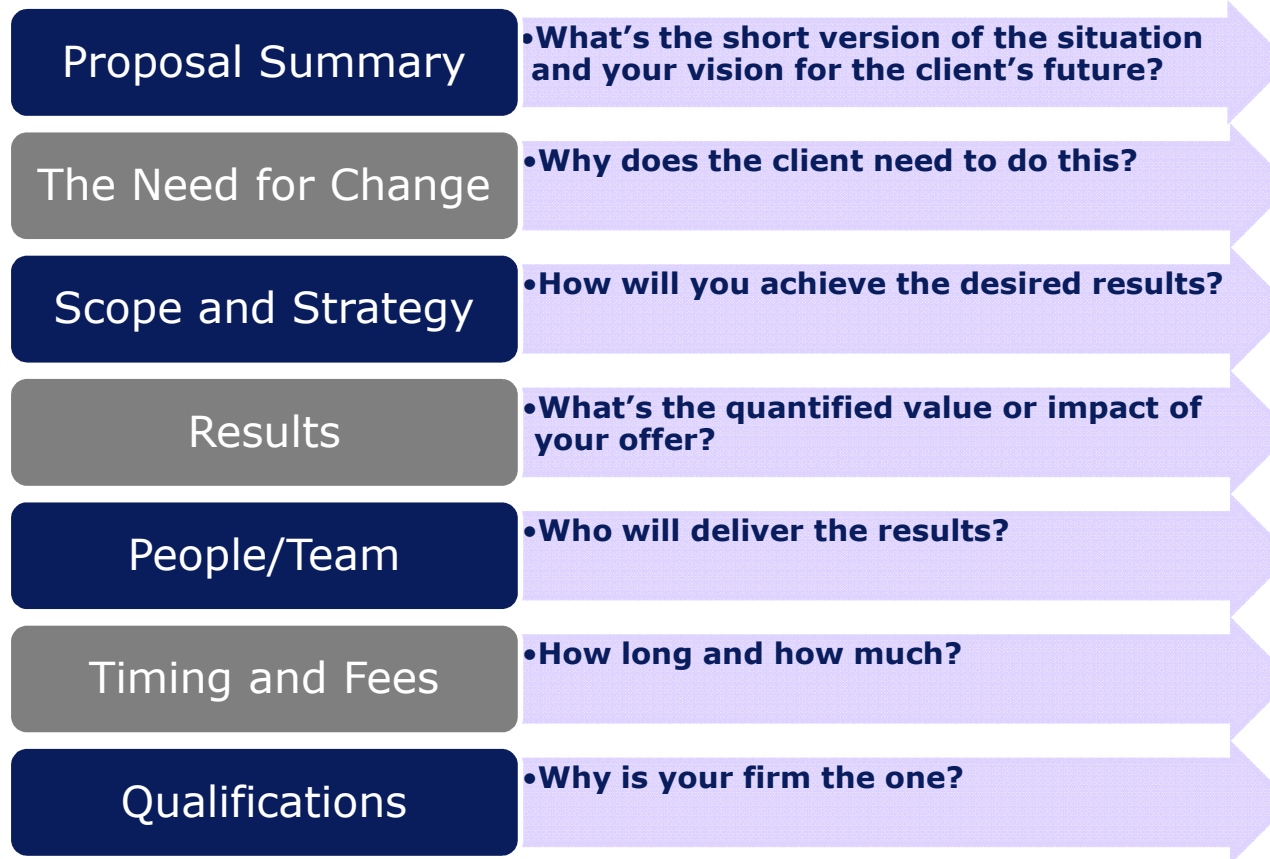
Before You Write a Word

Project Knowledge	Clarity
Approval/Funding	Commitment
Opportunity Cost	Client Impact
Decision Process	Competition
Why You?	Qualifications

Anchor Every Proposal with a Client Win Theme



The Parts of Every Consulting Proposal



Proposal Reality Check

A Single Typo Can Sink a Sale.

Test Your Proposal Logic

Are proposed results consistent with project objectives?

Will proposed project scope achieve desired results?

Is the project approach aligned with project scope?

Is project timing sufficient to complete the scope?

Can the project team execute the approach?

Are proposed fees aligned with expected value?

Mastering the Proposal Summary



The Problem with Most Proposal Summaries Is Lack of Client Focus

Before:

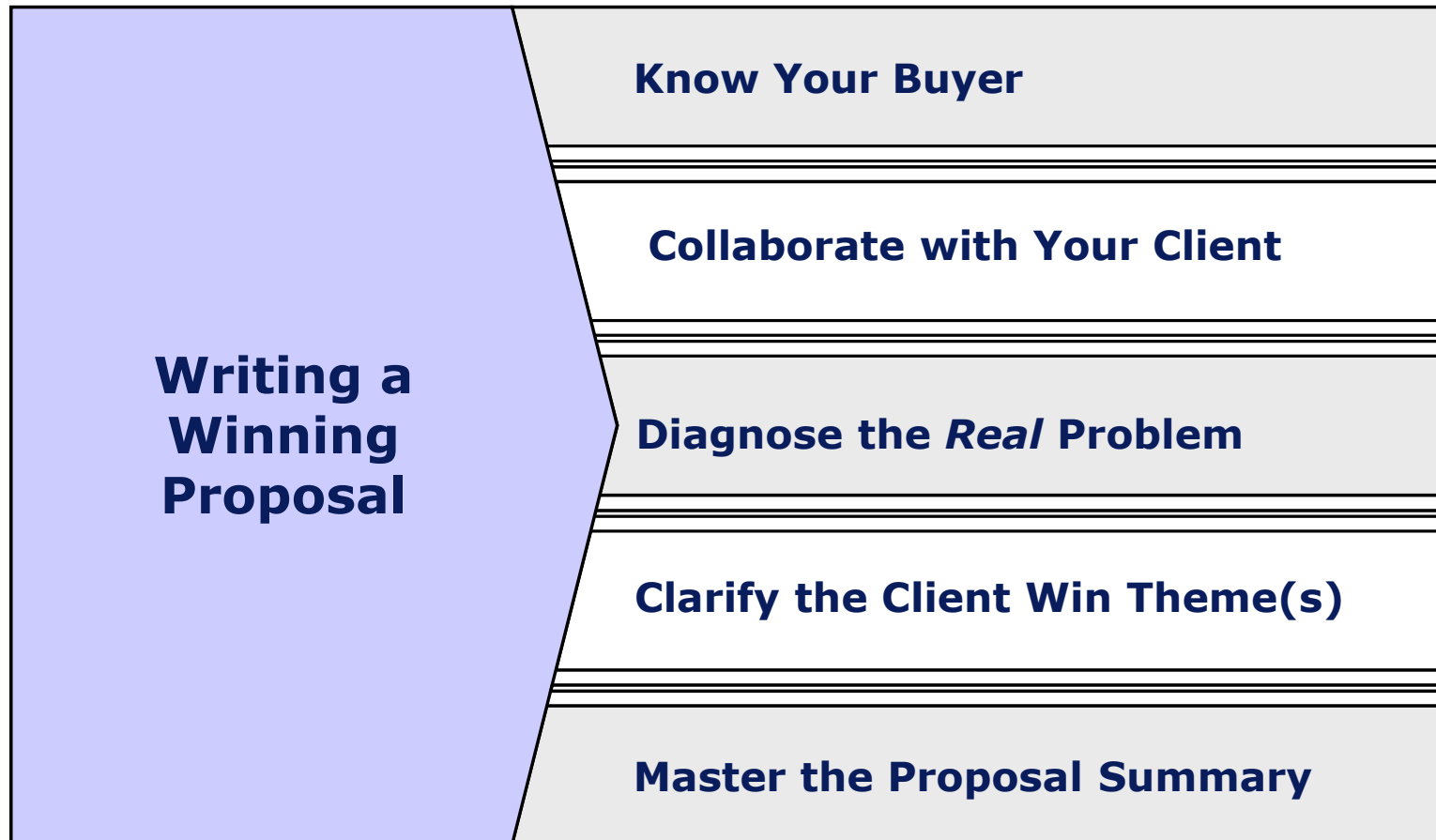
“Acme Global Consulting is well-positioned to assist Big Time Inc. with the project to restructure its IT support operation.”

After:

“Big Time Inc. faces increased demand for IT support due to a recent acquisition, which added 600 new IT system users. To manage the new demand, the IT support team must identify a strategy to serve 30% more users with a 10% budget increase.”

Proposal Reality Check

Rewrite Your Resume for Every Proposal.



Additional Resources

Free Monthly Newsletters for Professional Services Providers at:

www.GuerrillaConsulting.com

www.ManagementConsultingNews.com

Complimentary eBook:

Consult This!: 67 Tips for Consulting Success

by Michael McLaughlin

Download at: www.MindShareConsulting.com

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About the Presenter

Michael W. McLaughlin is a Principal with MindShare Consulting, LLC, the author of *Winning the Professional Services Sale*, and the coauthor of *Guerrilla Marketing for Consultants*.



MindShare Consulting specializes in helping professional services firms create opportunities for profitable, long-term client relationships and offers assistance with:

- Market planning and strategy
- Sales lead generation
- Proposal development
- Account management
- Web site effectiveness

McLaughlin also offers seminars, workshops, and keynote presentations on marketing, sales, and business management.

He is the publisher of two newsletters distributed to professional service providers around the world: [*Management Consulting News*](#) and [*The Guerrilla Consultant*](#). For more than twenty years, he was with Deloitte Consulting, most recently as a Partner in that firm's strategy and operations practice.

Thank You