Consulting Proposal Template

You are an expert in your field, and you have useful advice to give to other professionals. But what is the best way to share your services with potential clients? A consulting proposal helps you present your solution, show your credibility, and name a price for your work. This template will help you develop a proposal to successfully pitch your consulting services to win contracts with new customers.

HubSpot Tip: This template provides a foundation for bidding work with new clients, but you should feel free to update it to meet the unique needs of your specific professional field and customers.

Introduction

Every client's needs are unique, and every project is a little bit different. That is why each consulting proposal should be tailored to the individual client and specific project.

Before you begin writing, you should research your client's background and preferences. Perhaps you have had phone calls to discuss the issues they are facing. If you know little about the client but want to propose your services in order to begin a new relationship, you can do independent research online to increase your understanding.

Write a few sentences describing the client and the issues you will address with your proposed consulting project.

Then, in a brief paragraph, introduce your consulting firm and what you do. Include a sentence or two on your firm's history and any similar work you have done in the past.

Close the introduction by providing a one-sentence summary of the project. This should be a written form of the "elevator pitch" you would use at a networking event.

HubSpot Tip: Even when discussing your own company, try to keep the focus on the customer by addressing only the aspects of your firm and experience that are relevant to the client's needs.

Objectives

In the previous section, you described in general the needs of your potential client. In this part of the proposal, lay out the specific objectives of the project, clearly defining what you will be trying to achieve.

- Objective 1
- Objective 2
- Objective 3

HubSpot Tip: Whenever possible, you should define how you will measure successful outcomes for each of your objectives. What metrics will you use to know whether the objective was achieved? How will the client know that your methods are working?

Approach

Begin by describing the general philosophy that will guide you during the project. Discuss industry best practices that you will implement, or trusted methodologies that you will employ. You should aim to ground your proposal in a framework that the customer feels they can trust.

Then, you will need to describe the tasks you will undertake during the project. The form that this section takes will vary depending on what field you are in. For example, you might include a list of deliverables (e.g., reports, documents, products) that you will submit to the client, or you might list the different phases of assessment that you will go through. Be sure to address all of the major steps in the process.

HubSpot Tip: One size does not fit all. Different industries call for different approaches. Perhaps you will need to write about your project management methodology or it might be more important to discuss the industry-specific frameworks that you will use. For example, for a management consulting project, you might talk about the Balanced Scorecard or Porter's Five Forces.

Schedule of Project Activities

Schedules are a crucial tool for effective project management. By including one in your proposal, you can show the client exactly what work needs to be performed, who will perform it, and the timeframe during which it will be done. Use a table like the one below to list milestones, activities, and deliverables.

Project Activity	Person Responsible	Start Date	Completion Date

HubSpot Tip: For complicated consulting projects with many contingencies between tasks, consider developing and including a Gantt chart to give a visual representation of tasks over time.

The Team

In order for your proposal to be accepted, you need to convince the client of your team's qualifications and expertise. Provide biographical summaries of the key staff that will work on this project.

- [Name], [Project Role] - Briefly outline the person's responsibilities on the project. Describe the experience and credentials that make them right for the job.
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HubSpot Tip: Depending on what is appropriate for your industry, you might also consider including headshots along with the biographical sketches and/or full resumes in an appendix.

Your Investment

Now that you have explained the project, you can tell the client how much your services will cost. There are many ways to present this part of the proposal, but you should aim to be clear and concise. Here is an example of how you might lay out the budget portion of your proposal. You can separate out each project activity, and then add all of the columns to give a total.

Project Activity	Rate	Hours	Price
Total			

HubSpot Tip: Consider listing any assumptions that might affect your budget or timeline. For example, "We will complete up to two revisions of each report."

Signatures

Describe the contract, any guarantees, and the terms and conditions. Your firm may have pre-written documents that you could insert here. If these documents are very long, consider just referencing them in the text and then provide them in an appendix.

Enter the names and titles of the decision-makers who will need to sign the agreement in order to approve the project.

______________________	______________________	______________________
[Name], [Title]	[Name], [Title]	[Name], [Title]

HubSpot Tip: By including the signature lines directly in the proposal, you can make the process easy for clients so that your projects can begin sooner!

Appendices

This section is where you should include important but lengthy information like terms and conditions, contract details, resumes of team members, examples from past projects, and case studies. By putting these documents in appendices, you can avoid interruptions in the flow of the proposal narrative.

HubSpot Tip: Label your appendices with letters (e.g., Appendix A, Appendix B) so that you can include references to each in the body of the proposal that are easy for the client to follow.