



## WHAT REALLY NEEDS TO GO INTO A PROPOSAL?

Given the choice of reading a 10-page, 40-page, or a 200-page proposal or capability statement, which would you choose to read first? For most of us, it's not a hard decision to read to the short document first.

***Which raises a question we're often asked: "what should we include in our proposal?"***

Many are tempted to throw everything in, hoping something strikes a chord with their prospective client. So what to include and what to leave out?

To make it easy, ask yourself if your content addresses one of these four key questions that your client will be asking.

- *Is this the right solution?*
- *Can they really do it?*
- *Is it a fair price?*
- *Will it deliver a good return on our investment?*

These questions will help you determine what to include in your presentations or proposal by deciding what matters to your client and what doesn't.

If an item doesn't compellingly address one of the four key questions, leave it out.

### ***4 types of content to include in professional services proposals***

In most professional services contexts, you need to include the following content in your proposals:

1. **A clear restatement of your client's needs**, issues, challenges or objectives. For example, a short set of bullet points in the Executive Summary. The more specific your restatement, the more helpful it will be. Restating your client's needs lowers decision maker anxiety about wasting money, wasting time, and losing reputation.
2. **A recommendation for a solution** that will eliminate their problems or meet their objectives. Strangely, many proposals do not recommend anything – they merely describe products or services. Tie the features of your solution to your client's needs, showing why each is important or relevant to them.
3. **Evidence to support your claims** that you will deliver the solution on time, and on budget. Good evidence includes references, testimonials, case studies, third-party evaluations, certifications or accreditations, and reviews. It may also be appropriate to include project plans, methodologies, team resumes, details of facilities and resources, and summaries of experience.



4. **A reason to proceed with your recommendation.** Without some kind of value proposition – ROI, payback, total cost of solution – the buying decision may come down to price. Base your value on your differentiators, or your competitors will be able to say "me too".

When deciding whether to include specific content, ask yourself whether it fits clearly into one of these four key areas.

If not, leave it out.

### ***Specific professional services proposal content***

Some of the specific content that will go to addressing the four key areas includes:

- your team leader, their credentials for the role, and how they will relate to the client
- what you plan to contribute to the relationship, besides technical expertise
- where you can add distinct value to the client's organisation: the network of useful contacts to whom you will facilitate introductions and related services which the client will access through you
- "feel good" aspects of being a client of your firm – and how that differs from the alternatives
- value-added services you will offer – and deliver
- techniques you propose to obtain client feedback
- how you'll evaluate your client's satisfaction – measures or indicators you will use
- how client satisfaction feeds into your internal appraisal, recognition, and reward systems
- how you will deal with problems and issues which arise
- what action you promise if your client is dissatisfied
- what else you'll do to establish a relationship with the client which ensures they derive maximum value
- examples of other clients with whom you've developed similar relationships, and evidence of the benefits to these clients of your relationship – testimonials, references, case studies
- what this relationship means to you, and the "price" you're prepared to pay for it – how important the client will be to you
- how far you'll go to protect and advance your client's interests.
- the difference they'll notice in dealing with you and your firm.

Be clearly and convincingly painting a picture of the working relationship you have in mind, demonstrating that you'll constructively engage problems, and showing downstream benefits your client will derive; you will vastly improve your prospects of success.

We have suggested possible selling points which will help you to positively differentiate your proposal in a crowded market in [our blog posts](#). Increasingly, astute clients value law firms and other expert professional services providers who show that they are both fully aware of and respond appropriately to concerns about commercial sensitivities and conflicting interests.

### ***Quick key selling argument checklist***

This quick checklist will help you to develop the key selling arguments you will use to position your proposal:

- your understanding of this client's sensitivities to commercial confidentiality issues and conflicts
- protocols to maintain confidentiality (no, don't just treat this as a "given")
- systems and processes you use to recognise potential conflicting interests
- due diligence you have conducted to establish that there is no conflict



- real life examples of commercial sensitivities you have recognised, and your response to these
- examples of actual and possible conflicts – and what you would propose to do about them
- on-going input and collaboration from your client on these areas, and how you propose to obtain it
- what work/other clients you would be prepared to relinquish in order to establish and maintain a long-term relationship with this client – that is, how much this relationship does/will mean to you and what "price" you're prepared to pay for it
- how far you'll go to protect and advance your client's interest.

By proactively and constructively dealing with your client's commercial sensitivities, and any possible conflicts, you will advance your prospects by reducing perceptions of risk in accepting your proposal and establishing a business relationship with you.

*Get in touch and find out more about how we can help you.*

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