Without further ado I’m going to give you the exact proposal template I use with all my work. It ends up around 2 – 3 pages and generally doesn’t take me more than 20 minutes to write.

1. Current Problem

The first thing you need in a proposal is to describe the problem the client has. If you’ve recorded your calls with them then listen back to it and use the exact words they use. If you want to save time, write it down when you first talk to them so that you don’t have to spend the time listening to the call again.

This section should be one to two short paragraphs and by the end the prospect should be nodding their head and smiling. They should feel like you are both talking the same language around their issues.

The point is to get a quick win and bring them on side right away.

2. Objectives

Here is where many consultants create problems for themselves as they create a long list of every little thing they’re going to do. This takes all that work you’ve previously done to establish yourself as a strategic authority and turns you in to a tactical executor. That small change alone is going to reduce your rates and the authority you have with the buyer.

Don’t list all 42 things you’re going to do. Put in 2 or 3 high points but more importantly focus on what is the desired outcome of those high points. What will developing a new site bring the customer?

This is the section that prospects can turn in to that huge list of tasks. Don’t let them do it and be firm about it. If they really need it all written out break it down in a second document.

The point after describing their problem is to show them their bright future with the problems solved. Those are the outcomes of the work you’re going to do. By the end of this section they should be dreaming with you about how awesome things will be when you’re done.

3. Gauging Success

Here is where you start to put together your metrics for the prospect so they can see you’re not just a dreamer, you’ve got measurable results in mind. Remember this should just be a summary of the things you’ve already agreed upon with the prospect.

One big mistake here consultants make is gauging success on things they can’t actually control. If the overall goal is to make more sales you can certainly bring more leads in but if the sales team botches them all because of poor training then your metrics would still label the project a failure. Only include metrics you can directly affect.

4. Options

This section I leave out of the collaborative process with my prospects. I do this because the options I’m going to offer for the project are not a collaborative process. Once we work out what needs to be done how we tackle the work and what it’s price is are both things that only I have a say over.

Include 3 options not 4 or 2 or 12…3 options. You’re first lowest priced option should always actually accomplish the bare minimum of the project. If the goal is to have a new Web site and your first option only includes getting them a wireframe but no working site then not only are you seriously jeopardizing your credibility with the prospect you’re also lying to yourself about having 3 options.

Don’t be afraid to have 1 or 2 of your options go above the budget the client has expressed. Don’t be afraid to offer a little something extra that wasn’t quite discussed to your options.

For a recent project the main problem was a total lack of automation in the site. My third option included a bunch of automation that the client hadn’t even brought up as issues with the site but he valued that extra stuff and decided to spend an extra $4k to get that automation added to his project. Leaving that out would have cost me $4k.

5. Timeline

This section is also left out of the collaborative process with the prospect since it’s tied to tightly to the options. As the client adds more value to the job (more work) then it’s going to take longer and that’s not something they get a say in.

Don’t get specific here with dates. I usually write something like: “Option 1 will take 4 – 6 weeks” and leave it at that. Start dates are always conditional on a proposal being accepted and a deposit being paid. If the prospect wants to take 2 weeks to think about it and I get another project accepted while they wait then their project starts later.

6. Accountabilities

In my final section I lay some ground rules for the project and let my prospect know what they’re responsible to do during the project. One of my first rules is that we do what’s best for the site user. This often comes out on contact pages as the prospect doesn’t want to have a contact form or their phone number because they don’t want to get spam.

Users want to see all the contact information though so we always put down a phone number, email and use a contact form then let the user decide which to use. If the prospect gets spam email then we solve the problem of the spam.

Also make sure it’s clear who will be supplying additional resources and making purchased for the project. I always state that my prospect is responsible to purchase the software and tools needed on their site and supply me with access to them and that those purchases are in addition to the cost listed on the proposal.

But there was no introduction

Very true there was no introduction because I don’t think you need one if you’ve done your job right up to this point. If you’ve positioned yourself properly as the leader or sole source provider then the prospect knows who you are and doesn’t need an intro.

Of course if you haven’t done that and are just firing off an estimate to some email that got in touch with you then you’ll need an intro because they sent that email to 900 people and they’re never going to remember who you are.