

# Selling with Proposals

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## **SELLING WITH PROPOSALS**

### **WHEN THERE ARE TERMS OF REFERENCE**

TOR have to be read in different ways

1. for getting the job
2. for doing the job,
3. for writing the report

### **FOR GETTING THE JOB**

2. Sometimes you can write your own TOR, notably when you identify a problem on one project, and write it up as TOR for a follow-up
3. TOR may have been written by a previous consultant, by a junior civil servant, by a

committee. Conceivably, therefore, no one may feel any particular commitment to this particular approach.

4. TOR may be written by donors - which means that everybody may feel that it is rubbish but there is money in it for me.
5. The donors may or may not be on the selection panel and may or may not agree with the client.
6. Sometimes they are written with the greatest care by someone who wants results, and who will chose the consultant.
7. The TOR are unlikely to reveal the hidden agenda of either donors or the client.
8. At the stage where you write the proposal or negotiate the contract you may have considerable flexibility in changing or interpreting the TOR. It does pay, though to stick to the wording.
9. It is often worth going to trouble to get more information, visiting the country and interviewing.
  1. What kind of consultancy do they want?
  2. How much do they expect to spend
  3. What outcome do they want

10. They may not know what they want

## **DEVELOPING IDEAS**

11. There are many ways of developing ideas, a few of which may be incorporated in the proposal. These include: Brainstorm, Nominal Group (a sort of private brainstorming with everybody sending confidential suggestions to the leader. These are then discussed publicly, with no one knowing whose ideas are being discussed). Wish List (If I had £2m to do the job), Bulletin board in the staff room with 'Problem of the Week' and people pin up suggestions, Delphi method.

## **WRITING THE PROPOSAL**

### **OBJECTIVES**

12. You want to get the contract

13. You do not want to promise more than you can deliver in terms of

1. Skills

2. Inputs

3. Time

4. Number of outputs



14. You want it to be a competent job

15. You want job satisfaction

16. You want to make a profit

17. You want flexibility

1. The situation may not be what you expected
2. The TOR may be interpreted differently
3. The client may not be what you expected (e.g. not the committee but the Minister)

18. You want to maintain or increase your skills.

19. You want to be paid for the job, implying that it must be doable.

### **WHO MAKES THE DECISION?**

20. Try and find out who is making the decision. Phone up and ask if you are allowed to ask questions about the background etc, and slip in some questions. Is it

1. An individual??
2. The same person as wrote the TOR?
3. The same organization as wrote the TOR: it is not unusual for the World Bank to write the TOR and the local government do the selection?

## **WHAT ARE THE CRITERIA?**

21. They may have formal criteria and weightings e.g.

1. Technical competence of staff
2. Country experience and product experience
3. Technical appraisal of proposal
4. Record of company
5. Fee rates
6. Other costs

22. In practice it may be

1. Thickness of report, weight. This is much too thick to read, and largely irrelevant anyway, but decisions are still made this way.
2. Glossy
3. Slick presentation
4. Friend in consultancy firm
5. Bribe
6. Landrovers, computers to be left behind
7. Local consultants used (often a cover for a bribe)

## **SHOW YOU UNDERSTAND THE SITUATION**

23. This may be a rehash of the TOR. Many firms spend a lot of money on groundwork to win a big contract, visiting Siberia for a week or two if necessary. Check that this is permissible

## **WHAT TYPE OF CONSULTANCY DO THEY WANT?**

24. See *Modes of Consultancy*

## **WHAT OUTCOMES DO THEY WANT?**

25. First show that you recognize the outcomes they want, or at least that you recognize the ones you want to tackle.

26. Then say what outcomes you will produce. It may be that your outcome is a training course. You cannot promise that they will make use of the training

27. Be careful not to promise what you may not be able to deliver - cooperation, motivation etc.

28. What if they are unrealistic or undesirable?

29. These should be in the TOR but may not be. There is a lot to be said for rehashing the TOR and using their words as often as possible.

## **INPUTS**

30. List. This is your chance to say what wonderful consultants you have

31. Give CVs to help sell your project. See article on *Second XI*. Also see *Clients say that they will not buy when...* One fear of buyers is that the slick salesman is not the person who will deliver. A cheap recent graduate will be used.



32. Here or elsewhere, say what a wonderful firm you are, and what your track record is, for this product, this country, etc. even though it is largely irrelevant unless you have the same people tackling the product.

33. Give a time frame for inputs to protect you and them.

### **CONSTRAINTS**

34. Cover yourself by listing what they must provide in terms of cooperation, information, transport, accommodation, interpreters, etc. If possible get the cash instead of transport, accommodation, interpreters, etc. They usually let you down. It is no harm to have two very minor things they have to do, so you can make a fuss if they do not provide them.

35. Cover yourself about data that just does not exist, acts of God, etc.

### **EXCITEMENT**

36. One firm tries to fill it with excitement by getting a team to assemble after work and work on it all night.

### **CONTENTS**

‘THE PURPOSE OF WRITING A PROPOSAL IS TO WIN BUSINESS: IT IS NOT TO EXPLAIN MY ACTIVITIES’ Lambert. Never give away services for free.



37. Flow chart of activities

1. What you propose to do
2. The order in which things will happen
3. Time elapsed. Time line, Gantt chart
4. Days, weeks input
5. Simultaneous or overlap

The justification for this is that

6. You sort out your own constraints
7. You convince your clients that you are professional
8. You show your clients that they are paying for solid inputs, and the costs are justified

38. Benefit statement for each activity

1. With some types of consultancy it is possible to say how they will benefit from each activity.

39. Reporting and consultation timetable

1. Inception report
2. Interim reports
3. Draft final
4. Final



but also

5. Consultation to get data, etc.

40. Summarize costs: you do not want to give them too much detail to argue on

41. Logical framework (this is a technical term for one kind of planning, which some clients like)

1. Some people like it, but it is usually already done in the TOR

42. Terms and conditions

43. Mission statement

44. CVs