

# SELLING CONSULTANCY

Peter Bowbrick

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## **WHAT CLIENTS FEAR**

These are some of the fears people have when employing consultants, though they are not likely to tell you. The fears should be addressed at all stages, but particularly when selling and writing proposals.

*A consultant is someone who borrows your watch to tell you the time, then keeps the watch.*

### **Incompetent consultants**

1. The clients hire a consultant because they know that they cannot do it themselves. They know it is difficult: it is not obvious that the average consultant is any better.

### **Improper diagnosis or needs analysis**

2. They fear that many consultants do not analyse this company's operations to diagnose its problems and identify its needs. Instead, they use an off-the-shelf methodology which may be quite inappropriate, and may even come up with off-the shelf-answers.

### **Pushing a product**

3. Clients fear that consultants are pushing a product, regardless of how appropriate it is, most obviously with software, TQM ISO9000 etc

### **No management control**

4. The consultants are not answerable to any person or department in the organization. The fear is that they are a loose cannon.
5. A particular fear is that the individual who decides to employ them is diagnosed as being the

problem, and is fired as a result of their investigation.

### **Dependency**

5. There is a fear that consultants will install systems which the firm cannot operate by itself.

They will have to keep employing consultants for ever to keep it going. Particular concern is expressed about computer systems and ISO 9000 which must be validated every year.

### **High fees**

6. Consultancy fees seem very high indeed to people who do not know how much it costs to employ their own staff, and particularly how much it would cost to take on permanent staff.

### **Not enough time given**

7. They realize that if they try to cut costs there may not be enough time to do the job properly.
6. Low fees lead to cutting corners, selling the same work to two people, etc

### **Admission of failure**

8. Individuals fear that, by calling in consultants, they are admitting to colleagues that they are incompetent. Firms are afraid of a public admission that they cannot do their job. Accordingly proposals should emphasize specialized skills, lack of staff time, necessity to use consultants for downsizing, etc.

### **Confidentiality**

9. They fear you will give away confidential information to your next client. Accordingly, do not mention past clients when selling. Do not give identifiable details about problems. Do not even give references without saying, 'I have to ask

permission'.<sup>1</sup>

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## **WHY PEOPLE ARE FRIGHTENED OF BUYING CONSULTANCY**

Your clients buy because they have to, not because they want to. They are frightened.

### ***Admission of their own incompetence***

Buying consultancy is admitting to their colleagues that they are not competent to do it themselves. Emphasise that few firms have the time or the special skills, or that they need an outside view. Efficient firms downsize and buy in expertise.

### ***Hard selling consultants***

They are afraid that slick salesmen will con them into buying consultancy they do not need.

### ***Consultants may get them fired***

Consultants are seen as being responsible to no one. Clients fear that they may recommend that the person employing them is fired.

### ***Incompetent consultants***

They have heard stories of incompetent consultants. They do not know if you are competent.

### ***Consultants push a product***

Consultants may push ISO 9000 or another product such as software because it is what they know, not what the client needs.

***Consultants create dependency***

They may establish systems that need consultancy input for ever such as validating 'Investors in People' or ISO9000.

***Consultants charge high fees***

Clients think of consultants as being very expensive, but have no real understanding of how much their permanent staff cost them.

***Consultants will not give enough time to do the job properly***

***Confidentiality***

Any name dropping when selling may be seen as breaching confidentiality.

***Second XI***

They think that they will pay for the top consultants who do the selling, but will get cheap recent graduates.

## CLIENTS SAY THAT THEY WILL NOT BUY WHEN

### ***There is a Second XI***

The negotiation is with experienced consultants. Cheap recent graduates do the work.

### ***Consultants claim to be experts in everything***

or they seem to be dishonest about their qualifications or their experience

### ***Consultants promise the moon***

They promise enormous cuts in operating costs when they have not looked at the figures and cannot possibly know. Generalist salesmen make promises without having any idea of the specialist economic, engineering, computing etc. skills of the consultants who will do the work.

### ***The hard sell***

### ***Consultants do not listen***

Consultants are saying what they can do, and selling the contract, without first finding out what the client needs.

### ***Consultants give a standard sales spiel***

They have not found out about this client, and are selling the same solution to everybody...

### ***Consultants have off the shelf methods and solutions***

They will apply the same methodology and come up with the same answer, whatever the client's problem.

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***Consultants think that this client's problems are the same as a previous client's***

When they are obviously different to the client, there will be no sale. It is very easy to give the impression that because you worked in the same sector or with a similar client that you think they have the same problems and you will recommend the same solutions.

***Consultants drop names***

They then fear that consultants will tell stories about them to prospective and actual clients. Even if asked for a reference, say, 'I will have to ask their permission before I give you their name'.



## **SHOULD YOU GIVE FREE DIAGNOSIS?**

1. Free diagnosis is something you do because you have to. When you build up your reputation and repeat business you may not have to do it. For the reasons given below, it may still be important for some types of consultant always.
2. If it is free, say so. Most clients expect that they are paying you every minute, and may reject it for this reason.
3. Doing a diagnosis means that you are a lot closer to selling a job. It means that you are in a position to get the information needed to sell the job properly. It is easier to get a prospective client to accept a diagnosis than to sign a contract on your first visit.  
You can postpone your selling until you know what you have to sell.
4. There is no such thing as a free lunch. Free diagnosis has to be built into your fees. You cannot charge double fees because you do four one-week diagnoses for every month sold. You can probably get away with ,600 a day instead of ,500 because you will have done a better selling job. Unless you have a very high hit rate, it brings your average income down to unacceptable levels.
5. You are trying to get the information needed to clinch a deal which is satisfactory to your clients and yourself. The job must be profitable, it must be doable and it must keep the client happy.
6. You may tell your client when you are negotiating to do a diagnosis that you want to

check that you can produce £3 in extra profit for every £1 you will be paid.


***Does he know what he wants?***

1. Some possibilities are:
  1. He knows exactly what he wants the consultant to do
  2. He knows that something is wrong but he does not know what. He may just have a feeling that he is not making enough money.
  3. He knows that he is efficient and competitive, but he wants to be better still, and keep up with competitors who are also improving, and with a changing market. Very similar at first sight to the previous, but a different relationship. It may be worth pushing this on the surface, so he does not have to admit to a problem.
  4. You have a service to sell which he might or might not want and which he might or might not need. Like free damp inspections.
  
7. Clarification is urgently needed before you put your foot in it
  1. See article on *Modes of Consultancy*
  
  2. Does he want Advice
    1. What to do?
    2. How to do it?
    3. ....
  
  3. Does he want you to install a process e.g. ISO9000?

4. Does he want information, like market research? Does he want the raw data or does he want you to analyse it?
  
5. Does he want something done? Advertisements designed and published, install computers? I.e. does he want you to tell him what computers and software to install or does he want it hands on and ready to go.
  
8. Generally he will have a hotchpotch of all these. It is up to you to separate out the different things e.g.
  1. As specified in the business plan
  2. Vague ideas for the future
  3. There may be many ideas at different stages
  
9. Initially you want to separate out the ones you can do and can sell. Others can be borne in mind. You may be able to do *networking* - passing the job to colleagues on a reciprocal basis.

***When he knows exactly what he wants***

1. If he wants a service you can offer, but you think that he does not need. *Ethics, Reputation.* How do you get out of it?

- 
10. If he wants a service you can offer, but you have insufficient information to know if he needs it or not. *Ethics, Reputation*. Keep an open mind? Tell him of your reservations?
  11. If you cannot do it and you think he does not need it. You do not want to attack his preconceived ideas, but on the other hand you do not want him spending his consultancy budget elsewhere. You can perhaps be the disinterested outsider giving him sound advice about something that does not bother you.
  12. If he needs it and you cannot do it *Network*
  13. If he needs it and you can do it, this is your opportunity to sell. Show him that he is right. Show him that you can do the job

### ***You have something to sell***

1. Some of us are single product consultants, selling a single technique, and, one hopes, being experts in that technique. Others have a toolkit of several techniques. Only the very largest firms would claim to be able to supply everything in house (they lie).


To some extent all of us are in the position of selling the techniques we have. We may not be able to tell whether these are of the highest priority. *Ethical problems* can arise.


14. Some situations are:

1. He does not need it or want it. *Ethics*
  2. He wants it but does not need it. *Ethics*
  3. He needs it but does not yet want it. It is up to you to prove it to him.
  4. He wants it but does not need it
    1. Simple if it is harmful or a total waste of time
    2. It is probably a good thing, but it is not top priority.
  5. He needs it and wants it: Reinforce: tell him how clever he is. Tell him he can do the job.
- 
15. You have more credibility if you have a toolbag. *Networking* means you can say outright that he does not need you, today, but you can provide what he does need.

### ***When he does not know what he wants***


1. You have a limited time to get what you want. It is worth having a check list.
- 
16. You want to talk to the client. The decision maker? The MD? Try and ration this. Say an hour at the beginning, an hour later and an hour at the end maximum. If he is loquacious and telling you a lot that is very interesting but a bit off the subject try and steer him. He may not notice while he is talking how long it takes, but he will afterwards. At the end of a week he finds he has given you nine hours. He decides he cannot go on like this for the whole consultancy, so he will do without it.
- 
17. You are not counseling him now.

- 
18. You are not giving solutions ‘I am always worried by consultants who start giving advice as soon as they get out of their car, before they have understood the firm’s problems and opportunities’.
  
  19. Who to speak to. Get him to introduce you and clear it.
  
  20. What sources of information. You may not have access to all of them at this stage, but you must know what exists. This means you do not duplicate. It also means you can negotiate access and cooperation in your proposal.
    1. MIS manual and sample output
    2. ISO9000 manual
    3. Any other manuals
    4. Any previous consultancy reports
    5. Internal consultancy
    6. Any market research
    7. Financial accounts (one for the taxman.
    8. Management accounts
    9. Budget
    10. Production plans
    11. Organogram
    12. Library: trade journals and other data
    13. Internet data
    14. Other data sources available.

- 
21. Negotiate to have the data on disk or at least to be able to analyse it on their computer. You cannot afford to spend time entering data.
  22. You will need to do some analysis to determine the quality of the data.
  23. I would expect to find sources of information that senior management were not aware of.
  24. Your job is to get enough evidence to convince yourself that you can justify your fee.  
Then
    1. Try and get enough evidence to convince him: this may be difficult without revealing what you have found out, or what methods you will use. If you can convince him, you will be able to charge a daily rate, with him bearing risk.
    2. If it is not possible to convince him
      1. Payment on achieving stated results, or
      2. Take a percentage of increased profit etc.

### ***Information that sells consultancy***

1. At the same time you will want to get the information that makes your proposal and your pitch sell.

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25. What consultancy does he now buy? What has he bought in the past? Was he happy with it? Why?
  26. What buzz words does he use? It adds weight to a proposal if it uses his terminology and turn of phrase.
  27. What does he do?
  28. What does he want to do?
  29. What does he think he wants to do?
  30. What does he think consultants can do?



## HIT RATES

1. Writing proposals is expensive
  1. It is usually done by paid full-time staff: it is not really possible to write a proposal when you are in the field doing a job for someone else.
  2. Research is expensive and time consuming.
  3. Visiting the client, often in a foreign country is very expensive.
  4. Assembling a team (with the loss of confidence if you never seem to get them a job).
  5. Printing
  6. Submitting
31. Therefore you must get a good hit rate.
32. E.g. if you get 1 in 6, and spend a week writing each proposal, then for a four week contract, you must charge enough to pay ten week's work.
33. Therefore you need

1. Higher hit rate
  2. Less time per proposal
    1. One suggestion is that if it fails, you recycle it, offering it to other customers who have not expressed an interest. This may work in some businesses, but will be of limited value elsewhere.
    2. Keep a library of failed and successful proposals and do a cut and paste. The danger with this is that you are rehashing unsuccessful proposals without knowing why they are unsuccessful.
  3. Bigger fee income per proposal, either by bidding for bigger contracts employing a team, or by charging higher daily rates.
  4. Pay consultants less when your selling costs are high. This is not feasible, as, if anything, they need higher fee rates for short term consultancy.
34. To get a higher hit rate
1. Follow up to see why you have not got the job.
  2. Use more skillful writers
  3. Do more research (probably by bidding for more jobs within a narrow field)
  4. Use the experience of local contacts, local firms, local consultancy firms, people who have worked there.
35. Think twice about doing low probability proposals.
1. Possibly if you have nothing better to do. It may at least draw your firm's name to the clients' attention. It may convince freelancers that you have



not forgotten them, though it will help them think of you as a loser.

36. You may have a high probability proposal that you do not want to get because you are fully stretched.
  1. Plead conflict of interest
  2. Overprice
  
37. Best is to go for follow-on work from existing projects, where you do not have to do competitive bidding. Your report from phase 1 becomes your proposal for phase 2.
  
38. Similarly your chances are improved if you can use referrals, same country, same firm, same products.

## **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**

39. 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

40. 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.

41. TOR may be written by donors - which means that everybody may feel that it is rubbish but there is money in it for me.

42. The donors may or may not be on the selection panel and may or may not agree with the client.

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43. Sometimes they are written with the greatest care by someone who wants results, and who will chose the consultant.
  44. The TOR are unlikely to reveal the hidden agenda of either donors or the client.
  45. 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.
  46. 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
  47. They may not know what they want

## ***DEVELOPING IDEAS***

48. 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**


49. You want to get the contract

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

1. Skills
2. Inputs
3. Time
4. Number of outputs

51. You want it to be a competent job

52. You want job satisfaction



53. You want to make a profit

54. 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)

55. You want to maintain or increase your skills.

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

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

57. 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?**

58. 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

59. 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**

60. 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?**

61. See *Modes of Consultancy*

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

62. First show that you recognize the outcomes they want, or at least that you recognize





the ones you want to tackle.

63. 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

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

65. What if they are unrealistic or undesirable?

66. 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**

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

68. 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.

69. 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.

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

## **CONSTRAINTS**

71. 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.

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

## **EXCITEMENT**

73. 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.

74. 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

75. Benefit statement for each activity

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

76. Reporting and consultation timetable

1. Inception report

2. Interim reports


3. Draft final

4. Final

but also

5. Consultation to get data, etc.

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



78. 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

79. Terms and conditions

80. Mission statement

81. CVs

## ONE KIND OF PROPOSAL

This section shows how to write one kind of proposal. It may not suit you. It is difficult for those consultants who go into a business, nose around, analyse what they find and come up with results. It is not suitable for policy. It is appropriate for those who are going to produce easily measurable results.

It may be worth separating the processes of preparing the project and writing the proposal.

Much of the preparation could go into several proposals, one's track record and uniqueness for instance.

82. The proposal should emphasize what it will do for

1. The client organization
2. Each of the decision makers (this may have to be done discretely)
3. The financing organization if different from the client.
4. Individuals in the client organization

It should not say what it will do for you. What you do and how you do it is only relevant in so far as it affects what it will do for them.

83. Show that you have understood their objectives and that it fits in with them. This may be a simple matter of rehashing what is in their TOR if they have one. If you are doing a new proposal, not responding to TOR, then you must find out. It is not

always clear who you are working for.

84. Language: Use their language. The words and phrases in the TOR or the words and phrases that they use. This gives confidence that you have understood them. It may be subconscious, but it works

85. Individuals and organizations want recognition. They should be recognized in the proposals. The proposal should also show how they will get increased recognition through the project. It may build up one individual's empire. It may mean a logo on your car or visiting card. It may mean a PR and dissemination component. This may be part of the formal objectives of the project, or an additional benefit.

86. There are two approaches

1. Have an idea or a skill and go round and look for someone who will buy it.
2. Find out what the client wants, and prepare a project that will give it to him or her.

Inevitably, we all have to do a mixture of the two. However, the proposal should be presented as finding what the clients want and giving it to them.

87. INPUTS      ACTIVITIES      OUTPUTS      OUTCOMES

They are looking for outcomes ‘a better world’, ‘Freedom from Hunger’. You can only offer them clearly visible outputs which lead to a measurable goal. For presentation it may be better to work the other way, so that they know what is in it for them before they start reading the detail:

OUTCOMES                  OUTPUTS                  ACTIVITIES                  INPUTS

88. Concerns that must be addressed:

1. Are you working for them and their objectives?
2. Will you do the job?
3. Are you cost effective?
4. Even if cost effective, is the money just too much?
5. *Second XI*
6. Who monitors and controls the consultants?
7. Who monitors and controls the money?
8. No obvious relation between what you say you will do (ACTIVITY) and what you claim your OUTPUT will be.
9. Are you duplicating
  1. Other consultants?
  2. Government?
  3. Public bodies?
  4. Information and advice that is easily available in books and the trade press?

10. What happens when you leave?

Many of these are particularly important with non-commercial clients

**What are your assets?**

89. You must sell yourself on what you are good at. No one is good at everything.

You must know your weaknesses and you must know the constraints, even if you do not present them to the client.

90. You may be concentrating on factors like your uniqueness, your cost-effectiveness, what you have done in the past.

91. Company credibility

1. Track record. What you have done in the past.

2. Especially with same client

3. Clients

4. Recommendations


5. Financial resources

6. Staff you have access to

7. Backstopping

8. If not a straight commercial consultancy, mission statement, objectives, long term plan.





92. Consultant credibility. How do the consultants on the project measure up

1. Qualifications
2. Experience
3. Track record

93. Problem credibility. Is the problem you have identified a real and important one?

Is it the key one? If they have identified it, it may be necessary to emphasise that they are right.

94. Method credibility. Is the method you are going to use credible.

1. Have you worked out a method?
2. Is it in the plan?
3. Can it solve the problem?
4. Is it cost efficient?

95. Communication credibility

1. Do you communicate well in the proposal?
2. Will you communicate well in the project?
3. Will you give a comprehensible final report?
4. Is there a PR component?

5. Is there a dissemination component?

**Why we are the best people to do the job**

1. What makes us the best (above)?

96. Why should they employ us rather than anyone else on the short list (and why indeed should they employ anyone?)

97. What can we do for the clients that no one else can?

98. What can we do for the financiers that no one else can?

99. Fill in this table to help

QUESTION	ANSWER	FEATURES	BENEFIT TO CLIENT	BENEFIT TO DONOR	UNIQUE
WHAT?	Wholesale market	Only one in oblast	Improved marketing	Blueprint for others	No
WHERE?	Verkoyansk	Miningnear Town	cons-umers in Siberia	Visible	No
WHO?	Mr Smith	Expert	Market No disaster		Yes

In markets      will work      (embarassing)  
                                 profitably      Loan repaid

WHEN?

HOW?

WHY?

### ***GOALS, OUTCOMES AND OBJECTIVES***


2.      Goals and outcomes are broad policy

100.   Objectives are specific, measurable and time bound. These carry a great deal of weight with clients. They should

1.      Specify a result, an OUTPUT not an ACTIVITY

2.      Each should normally state just one result. Clearly this can get out of hand with a big project having fifty or sixty results.


3.      It should be in the form 'to (verb)'

- 
4. It should specify WHAT will be done WHEN, not WHY or HOW
  5. It should be feasible with the resources available
  6. It should be designed in consultation with a working consultant, preferably the one who will do the job. Far too often it is done by an office junior or someone who is a seller rather than a doer.
  7. It should be based on inputs from the client and ideally those affected, such as the customers.
  8. Cost limits should be specified
  9. It should be specific, measurable and verifiable. (Note dangers if you are not only person)
  10. Flexible

Note that this is in essence the Logical Framework approach

101. Fill in this problem worksheet:

1. What is the problem?

- 
2. Who is affected by it? (E.g. prisoners, single parents, ethnic minorities are all selling points)
  3. Related problems?
  4. Who is affected by them?
  5. Size of problem?
  6. Cost of problem?
  7. Causes of Problem?
  8. What will happen if no action is taken?
  9. Who should act?

## OUTLINE OF A PROPOSAL

When you have determined what the project is about and how you can help, you can then write the proposal. This means that you can write it quickly, excitedly and coherently. You may not be able to do this if you fill in sections as you go along.

### Covering Letter

102. This is to persuade the prospective clients to read the proposal and to put them in the right frame of mind.

103. It should briefly summarize the problem and evidence for it (e.g. a public outcry)

104. Summarize the project in 25 words

105. Introduce the firm: references, previous work for the client, networks

106. Introduce the person who will present or follow up

107. Be signed by the MD to give credibility.

### Title

108. The title is important. It can say a lot 'Kindergarten Cop', 'Uplifting of the Rural Masses.' It is an important selling tool. It will be repeated time after time. Avoid acronyms: CARE, SAP etc. Avoid jargon, literary references, and puns. They rapidly lose the message. Ideally, the title should be the result, the problem solved, the outputs achieved.

### Cover Page

Project Title

Duration

Amount

Firm's name, address,  
Telephone, Fax, E-mail

Person responsible?

Abstract?

## **Summary**

109. Justification: two sentences

110. Objectives: two sentences

111. Benefits to client

112. Benefits to donor

113. Methods or activities: two sentences

114. Evaluation system

115. Cost

## **Introduction**

116. Your credibility:

1. Who are you?
2. What are your organization's goals (particularly important for non-commercial)
3. How project fits your goals.
4. Academic and experience competencies
5. Credibility
6. Credibility for this project

Important to remember that you are not doing this for your benefit: it is their concerns

that are central, and your credibility is related to their concerns.

## **The Problem**

2. Whether you have identified it or it is stated in the TOR, it is necessary to spell it out in detail. It may be self evident to you, but you have been working on it for ages. The client may never have thought about it.

117.Supporting evidence. Previous studies, research, political pressure, etc.

118.Make it clear that the problem is soluble. □ Freedom from Hunger□ is too big, and removes your credibility.

119.State it in terms of outputs and outcomes. This makes it look as though you will achieve something.

120.Say why they should be willing to pay for it.

## **Methods and Activities**

121.Say what you will do, not how. OK to say multiple regression analysis of results of stratified random sample if they push you. Jargon may or may not be appropriate.

122.State activities.

123.Sequence of activities suggests that you have thought about it. Diagrams or networks may be appropriate

124.Is your method unique or much the same as your competitors'?

125.How does your method relate to the outputs stated?

126.Brief CVs or person descriptions of staff: CVs in appendix.

127.Brief job descriptions attached.

128.Timing of input of each consultant, presented similarly to sequence of activities.

129.How the consultants will relate to the client organization

130.Steering committee





131. Total person input and cost.

132. Define scope and limitations. Your project may be restricted to one area, to single women below 30, etc. State how selected.

133. Risk. What assumptions do you make? Availability of data etc. Put what they must provide here. Re emphasize it later.

### **Costs and benefits**

1. Total costs

134. Benefits if basic target met.

135. Cost benefit ratio

### **Monitoring and Evaluation**

136. How will they know you are putting in the agreed inputs?

137. How will they know you are doing the agreed activities?

138. How will they know you are reaching your carefully defined output targets?

139. Who will do the evaluation?

140. This includes data collection, reporting. It may mean establishing a baseline situation that you can judge change by.


### **What client must provide**

141. Data, vehicles, interpreter, office, computer?

### **Sustainability**

142. What happens when the project ceases?

1. Can they run it by themselves?
2. Will they need a continuation? Who will finance it?

- 
3. If it is a blueprint, who will replicate it?

## **Dissemination**

143. Dissemination of many different messages:

1. Results of project
2. Blueprint for replication
3. The fact that there was the project, so the firm or organization is on the ball.
4. The fact that the donor financed it
5. The fact that Mr X instigated the project and hired the consultant

144. Who do the different messages go to?

145. How and when are they disseminated?

## **Appendix**

2. CVs of consultants

## **Financial Proposal**

146. This is often done separately, so that neither the freelance consultants nor juniors in the client organization know how much the firm is being paid.

## THE SECOND ELEVEN

147.

.One of the main fears of prospective clients is that they will not get the star performers, but someone cheap and inexperienced.


148. This happens a lot more in practice than they realize.

149. BUT *Lambert* p170 reports research that good salesmen have different personality traits to good consultants

1. CONSULTANT	SALESPERSON
2. Sense of VOCATION	Desire to WIN
3. Personal and Organizational DEVELOPMENT	ASSERTIVENESS
5. AFFILIATION	INFLUENCE
6. FOCUS on the specific	AFFILIATION
7. ORGANIZATIONAL POWER	DISCIPLINE

150. Your proposal should be judged primarily by the CVs of the people you propose but

1. By the time the clients make up their mind these people are not all available.

- 
2. By the time you mobilize the team they are not all available.
  3. Your clients may ask for others instead.


151. Unscrupulous firms will want to put in their own unemployed permanent staff, or else cheap consultants (unemployed businessmen?) instead of the people whose CVs got them the contract.

152. In one \$44 million contract they ended up with virtually nobody with any relevant skills.

153. As a consultant I object to my CV being used for selling other people's services, and me not getting the job. It often means that I have not let my name go up on another proposal. Some firms have the reputation for doing this a lot. Unscrupulous firms could do this to nobble the opposition. Often there are only half a dozen suitable people, and fewer than this are available.

154. It is normal for a freelance consultant not to let his name go on two proposals. The EEC will refuse to consider either proposal if he is a main component on both. It may be acceptable to go on short term on both if they are big projects with several long terms.

155. I have had people write to me after I had turned down others and say I was not on their proposal. Others presumably did not write. With the EEC and USAID one usually has to give a letter of commitment, so if one is not asked for this it may be an



indication.

156. Some unscrupulous firms may put you up without telling you, and then substitute.

Never permit people to do put you up without telling you, though they often ask you to on application forms. It is quite probable that someone else will have approached you.

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<sup>1</sup> For a full discussion, see Tom Lambert *High Income Consulting* Nicholas Brearly 1993