

Before Your Submit a Proposal, Address these Eight Points

1 **The right client.**

You are certain this is the right client and issue for you and your firm. Is this an appropriate client, given your strategy? Is this issue in your “sweet spot” in terms of capabilities? Is the executive with whom you will work an effective, respected individual in his or her organization?

2 **Well-defined issues.**

You have a thorough understanding of the issues you are being asked to address. This could happen in one conversation, but more likely will only unfold over two or three discussions.

3 **Agreed-upon objectives.**

You and the client have agreed on the specific objectives of the work—on the outcomes that are sought.

4 **A clear buying process.**

You understand the client’s buying process. Usually, you will have to ask about this. It is completely appropriate to ask questions such as:

- “Can you walk me through your decision-making process and timeframe?”
- “Who needs to approve the budget for this work?”
- “Who will make the final decision about selecting a firm to work with?”

5 **A relationship with the economic buyer.**

You have spoken to or met with the economic buyer. This is the individual who can make the decision to hire you and your firm. This could be a middle manager or it could be the CEO — it will vary from situation to situation. Often, the first person who calls you is not the economic buyer but rather a feasibility buyer—someone who is screening service providers, who can say “No” but not “Yes.” The worst mistakes made during the sales process often involve ignorance about the identity and role of the economic buyer.

6 **An understanding of value.**

You understand what is most important to the client—in other words, what particular value she is seeking. For example: Is speed critical? How important is cost? Does she want a highly tailored solution? You must understand which aspect of your proposed approach is most valuable to the client.

7 **Agreement on the outlines of the proposal.**

You have discussed the essential elements of your proposal with the client and reached “conceptual agreement” about it. You might say, “*Before I send you this proposal, I’d like to meet with you to walk through our basic approach. That way I can get your reactions and input before finalizing it.*”

8 **A follow-up discussion.**

You have an agreement to discuss the proposal with the client after you submit it. You don’t want to spend a lot of time writing a proposal, and then send it into a black hole. Schedule a phone call or face-to-face meeting to put the client on the hook to read the proposal and share his or her reactions with you.