

Consulting Proposal Template

Proposal for: [Client company]

Prepared by: [Your name, your firm]

Date: [Date]

Valid until: [Date, 30 days out]

1. Situation

[Describe the client's current position in their words, not yours. What is happening, what it is costing, and why now.]

2. Objectives

By the end of this engagement, [Client company] will have:

- [Objective one, stated as a business outcome rather than an activity]
- [Objective two]
- [Objective three]

3. Measures of success

We will both know the work has succeeded when:

Measure	Today	Target
[Metric]	[Current]	[Target]
[Metric]	[Current]	[Target]
[Metric]	[Current]	[Target]

4. Approach

Workstream 1: [Name]

[What happens, and what changes as a result.]

Workstream 2: [Name]

[What happens, and what changes as a result.]

Workstream 3: [Name]

[What happens, and what changes as a result.]

5. Deliverables

- [Deliverable, named as a thing the client receives]
- [Deliverable]
- [Deliverable]

6. Timeline

Phase	Weeks	What happens
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Discovery	[1-2]	[Interviews, data pull, current-state map]
Analysis	[3-4]	[Findings, options, modelling]
Recommendation	[5]	[Written report, decision session]
Handover	[6]	[Training, documentation, close]

This timeline assumes [access to named stakeholders and data within the first week, and feedback within [X] working days at each review point].

7. Investment

	Option A: [Name]	Option B: [Name]	Option C: [Name]
Scope	[What is included]	[Everything in A, plus]	[Everything in B, plus]
Deliverables	[Which ones]	[Which ones]	[Which ones]
Duration	[Weeks]	[Weeks]	[Weeks]
Fee	[Amount]	[Amount]	[Amount]

Included in all options: [revisions, calls, travel within X, licences].

Not included: [expenses, third-party costs, work outside the scope above].

Payment: [50% on acceptance and 50% on delivery / monthly in arrears / on milestones].

8. What we need from you

- A named decision-maker who can approve at each phase
- [Access to systems, data or people, with dates]
- Feedback within [X] working days at each review point

9. Scope and changes

This proposal covers the work described above. Additional work is quoted separately before it starts, at [rate]. Either party may end the engagement with [notice period] written notice, with fees due for work completed and expenses incurred.

[Add confidentiality, intellectual property ownership and liability here, or reference the master services agreement if one exists.]

10. Next steps

1. Select an option and sign below, or reply with questions.
2. We confirm a start date and issue the first invoice.
3. Kick-off call in the first week, with [named stakeholders].

11. Acceptance

Option selected: [A / B / C]

Signed for [Client company]: _____ Date: _____

Signed for [Your firm]: _____ Date: _____

