

Sample Proposals

Typical Approach

Proposals can vary a great deal, and we've provided examples that cover the range from formal contracts to informal letters of agreement. However, all were based upon previously-established conceptual agreement, and all provide a single fee for the project (or for each choice of yeses).

The normal framework for the value pricing proposal should encompass this basic sequence:

Situation Appraisal: Summarize and reconfirm the conceptual agreement concerning the condition to be improved and the desired state.

Objectives: The outcomes expected, both tangible and intangible, quantifiable and non-quantifiable. These should be expressed in terms of impact on the client's business, and sometimes are expressed again in the "values" category, if used.

Value: Either clearly stated or implied through buyer conversations, what is the value of achieving the objectives. This sometimes appears in the "objectives" category.

Metrics: How will the client evaluate success? What are the indicators that the objectives have been met? Simply stated: How would clients know it if they fell over it?

Timing: Projects are finite. When do we begin, when do we end, and are there progress measures in between?

Accountabilities: What is the client expected to provide (documents, access, administrative support) and what do we provide (focus group facilitation, product, reports)? What is the nature of the collaboration?

Credentials (optional): Why is Zenger Miller (and you) the best alternative for this client? This is usually already covered during the relationship-building. Sometimes this area includes the credentials of the individuals who will work on the project.

Terms and Conditions: What is the fee (including the options) for the project, how is it to be paid and under what conditions? How are expenses to be reimbursed, and what is included and excluded?

Acceptance: The sign-off by the economic buyer.

The following samples don't rigidly adhere to this format, but all of the elements have been agreed upon either implicitly or explicitly. They range from the short-term and relatively low-priced, to the extended, relatively high-priced. Some are pure consulting interventions, other include deliverables. None is meant to be

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