

Proposal meeting prep list

1. Prepare to quantify and articulate

- ☐ Prepare to discuss the steps you will need to take to complete the engagement.
  - Plan to verify with the client that the steps and associated timing are accurate and meet their expectations.
- ☐ Prepare to illustrate the value of the engagement.
  - Quantify in terms of revenue generation and/or cost savings that you determined from the Pricing tool.
- ☐ Further articulate any other added benefits.
- ☐ Prepare to articulate your unique value, process and prior success.

2. Prepare to discuss options

- ☐ Prepare to offer a tiered pricing package or other structure (determined from Pricing tool).
- ☐ Plan to discuss these options, understand the client's budget and arrive at an agreed upon price to achieve their goals.

3. Prepare to solidify the agreement

- ☐ Draft a formal proposal (tailored to the specific engagement/client).
  - Clearly set out the nature and the scope of the engagement. Consider including:
    - Expected results
    - Steps you need to take to complete the engagement
    - Non-monetary resources (e.g., staff time), if any, the client will devote to the engagement
    - Outside resources, if any, you anticipate having to call upon (do your homework as to outside fees that may be incurred and be VERY clear with the client and in your proposal regarding this issue)
    - Staff assigned to the engagement
- ☐ Be clear about the timing of the engagement. Consider:
  - Completion date and interim deadlines (if any) for stages of the engagement
  - Regular status updates to keep the client aware of the engagement progress
  - Client communication methods to address issues that may arise between status updates
- ☐ Specify the price for the engagement and how you will bill. Consider including:
  - Agreed-upon price (leave this blank for your proposal meeting with the client, but make sure it is in your final proposal)
  - Amount of retainer required upfront (if applicable)
  - Timing of your billing (monthly, bi-weekly, etc.)

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