

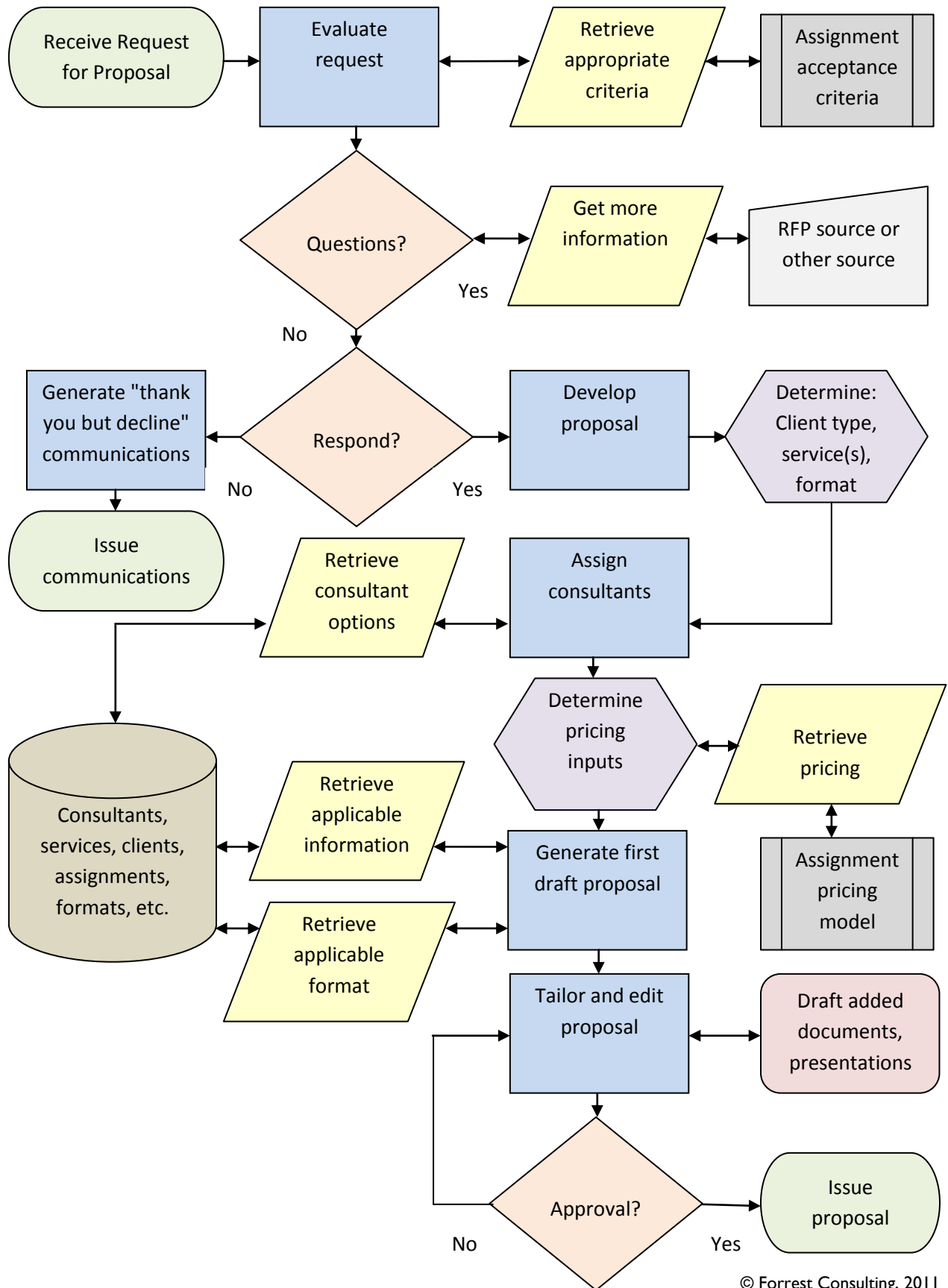
**Conceptual Proposal Development Process
for a
Professional Services Firm**

Lee Crumbaugh, Forrest Consulting

Conceptual Proposal Development Process Elements

- Proposal writer owns process, with output review and approval by supervisor and other decision makers.
- Process is data-base driven for efficiency and consistency.
- Upfront assessment based on pre-established criteria determines whether proposal will be created.
- Compelling case studies of successful assignments by service and client type are pre-written and are accessible through database.
- Consultant information including availability is accessible through database.
- Current and past client information including assignments and consultants is accessible through database.
- Information from data base can be served up in standard proposal formats by service and client type as well as in optional formats based on responses to previous RFPs.
- Pricing model determines assignment pricing.
- Draft proposal generated through data base and pricing model interaction is tailored and edited by proposal writer interacting with lead consultant.
- Metrics and reporting track proposal writing process and benchmark progress against RFP timelines and firm standards.

Conceptual Proposal Development Methodology



Conceptual Assignment Acceptance Criteria

Criteria	Questions (positive reply = assignment meets criteria)	Type
Scale	Does assignment size fit the range the firm targets?	Relative: Other factors may make assignment desirable
Timing	Are start/end dates achievable given firm resources and commitments?	Absolute, unless can acquire more resources and capacity
Client	Are client conflicts absent?	Absolute unless other clients "green light"
	Does firm serve or want to serve client type?	Absolute
	Does client fit desired client characteristics?	Absolute
	Is history with client good?	Absolute, unless definitive positive change in client
Service	Is firm currently offering or does firm want to offer the service?	Absolute
Staffing	Are appropriate lead consultant and supporting staff available?	Absolute, unless can bring on added qualified staff
	Are proposal writing staff members available to respond to RFP?	Absolute, unless others can be brought in to write proposal
Capacity	Are necessary supporting resources (systems, data, offices, equipment, up-front funding, etc.) available?	Absolute, unless other resources can be acquired
Profitability	Will assignment meet firm's profitability target?	Relative: Other factors may make assignment desirable
Terms	Will client meet the financial terms required by the firm?	Absolute
Commitment	Will the client make the commitments necessary for a successful assignment?	Absolute
Readiness	Is the client positioned to support the assignment?	Absolute
Risk	Is the risk of assignment failure below the firm's "no-go" threshold?	Absolute
Growth	Will assignment likely lead to more assignments from client?	Relative
	Will not performing assignment negate future business?	Relative
Visibility	Will performing the assignment bring desired visibility to firm?	Relative
Capability	Will performing the assignment add to firm's capacity to take on similar assignments in the future	Relative
Likelihood	Is the firm a reasonable candidate to win the assignment?	Relative: Other factors may make proposing desirable
Access	Does the firm have access to the people at the client necessary for a successful assignment?	Absolute
Information	Can the firm marshal the information needed to present a compelling proposal by the deadline?	Absolute

Conceptual Proposal Development Database



Consultants information

Bios, locations, roles, specialties, client types served, clients served, past assignments, levels, schedules

Services information

Services list, service descriptions by client type, cases by service and client type

Client types

Categories, sub-categories (e.g. college/university, small private college)

Assignments information

Assignment descriptions by service and client type, assignments by client, assignments by consultant

Formats

Standard proposal format and content by client type and service, options for client type/service based on past RFPs

Clients

Clients by type, clients by service, clients by consultant