Consulting Proposal

Prepared for: [Client name]

Prepared by: [Consultant name]

Date: [Date]

1. Background

[Client name] is engaging [Consultant name] to help with [describe the business problem or opportunity in one or two sentences — e.g., "declining customer retention over the past two quarters"].

2. Objectives

This engagement aims to: [list 2–4 concrete objectives — e.g., "assess current onboarding and support processes," "identify the top 3 drivers of churn," "deliver a prioritized set of recommendations"].

3. Approach

[Describe the methodology — e.g., "stakeholder interviews, a review of support and usage data, and two working sessions" — and how findings will be delivered, e.g., "a written report plus a live readout."]

4. Scope & Deliverables

[List specific deliverables — e.g., "a written assessment, a prioritized recommendations deck, and a 90-minute readout session" — and what is explicitly out of scope, e.g., "implementation of the recommendations is not included."]

5. Timeline

Estimated start: [Start date]. Estimated completion: [Completion date]. Key milestones: [list, e.g., "Interviews complete: [date]. Draft findings: [date]. Final readout: [date]."]

6. Fees & Payment

Fee Breakdown

Name	Total
Discovery & assessment	$3,000.00
Recommendations & readout	$5,000.00
Subtotal	$8,000.00
Total	**$8,000.00**

Expenses, if any, are billed separately at cost with prior approval.

7. Assumptions

This proposal assumes [Client name] will provide timely access to relevant staff, data, and materials needed to complete the engagement on schedule.

8. Confidentiality

Each party agrees to keep the other's confidential information private and use it only for this engagement.

9. Governing Law

This agreement is governed by the laws of the State of [State].

Signatures

By signing below, each party agrees to these terms.

[Client name] ("Client")

Signature: _____ Printed name: _____ Date: _____

[Consultant name] ("Consultant")

Signature: _____ Printed name: _____ Date: _____

This template is a general starting point, not legal advice — customize it and have it reviewed for your situation.