

Consulting Proposal Template

A consulting proposal template for pitching engagements professionally.

Open
template
page

What You Will Get

- **Executive summary** — High-level overview of the proposed engagement and expected outcomes
- **Problem statement** — Clear articulation of the client’s challenges and pain points
- **Proposed approach** — Phased methodology with timelines and milestones
- **Deliverables and timeline** — Specific outputs mapped to each project phase
- **Pricing options** — Multiple engagement models (fixed, retainer, hourly)
- **Team bios** — Credentials and experience of the assigned consultants

Proposal Header

CONSULTING FIRM Firm name, address, contact email, phone	CLIENT Company name, key contact person	
PROPOSAL DATE Mar 15, 2026	PROPOSAL # PROP-2026-007	VALID UNTIL Apr 15, 2026

Executive Summary

We propose a comprehensive engagement to modernize your customer onboarding process, reducing time-to-value from 14 days to under 4 days while improving new customer retention by an estimated 25%.

Understanding of the Problem

▲ Corcava

1. Customer onboarding currently takes 14 days vs. the industry average of 4 days
2. 35% of new customers churn before completing setup
3. Support team spends 60% of time on onboarding-related tickets

Proposed Approach

PHASE	TIMELINE	DESCRIPTION
-------	----------	-------------

Phase		
	Weeks 1-2	Discovery & Audit — Map current onboarding flow, interview stakeholders, benchmark against best practices

Phase		
Weeks 3-5		Design & Prototyping — Redesign onboarding journey, build automation workflows, create prototypes

Phase		
Weeks 6-8		Implementation & Launch — Deploy new system, train team, monitor KPIs through first cycle

Deliverables

DELIVERABLE	PHASE	FORMAT
Audit report	Phase 1	PDF
Wireframes	Phase 2	Figma
Automation playbook	Phase 2	Document
Implemented system	Phase 3	Live
Training docs	Phase 3	PDF + video
Post-launch support	Phase 3	On-call

Pricing Options

OPTION A: FIXED PRICE	OPTION B: RETAINER	OPTION C: HOURLY
<p>\$52,000 total</p> <ul style="list-style-type: none"> 40% at kickoff (\$20,800) 30% at Phase 2 (\$15,600) 30% at completion (\$15,600) 	<p>\$7,500 / month</p> <ul style="list-style-type: none"> 80 hours included per month Overage billed at \$125/hr 3-month minimum commitment 	<p>\$175-\$250 / hr</p> <ul style="list-style-type: none"> Rate varies by consultant level Estimated 280-350 total hours Billed bi-weekly with timesheet

Team

NAME	ROLE	EXPERIENCE
Sarah Chen	Engagement Lead	12 years in process consulting
Marcus Rodriguez	Senior Consultant	Automation specialist
Emily Park	Analyst	Data-driven process mapping

Terms

- Proposal valid for 30 days from the date above
- Work begins within 2 weeks of signed statement of work
- Client provides system access and stakeholder availability within 5 business days
- Change requests handled via formal change order process
- All intellectual property transfers to client upon final payment

Tip: Lead with the client’s problem, not your capabilities. Decision-makers want to know you understand their challenge before hearing your solution.

Related Templates

- [Statement of Work Template](#) — Define scope, deliverables, and terms once the proposal is accepted
- [Consulting Invoice Template](#) — Bill for consulting services with multi-rate team billing