Value-oriented Consulting Pre-Sales

Pre-Sales Readiness Checklist

Are You Actually Ready to Write That Proposal?

The Pre-Sales Readiness Checklist
A free tool for IT consultants and pre-sales professionals who want to stop wasting proposals on deals they're not ready to close.

The Problem Most Consultants Ignore

Writing a proposal feels productive. It looks like progress.

But here's the uncomfortable truth: **most proposals are written too early** — before the consultant really understands what's at stake, who holds the power, or whether the client is genuinely ready to buy.

The result? Polished decks that go nowhere. Deals that stall after the proposal. Hours of work that end with *"We'll be in touch."*

The fix isn't a better template. It's a better preparation.

What This Checklist Does

This checklist gives you **10 diagnostic questions** to run through *before* you open your proposal document.

Each question targets a specific pre-sales gap — the kind that experienced consultants have learned (often the hard way) to close before entering negotiation.

They come directly from **Worksheet 5 of the VCPS programme** (Value-oriented Consulting Pre-Sales), distilled into a standalone tool you can use right now — no prior training required.

Use it:

- Before writing any commercial proposal
- When reviewing a deal that's been stalling
- As a pre-meeting prep checklist before a key client conversation
- To coach junior consultants on deal readiness

How to Use It

1. **Run through each question honestly** — not as you wish the deal looked, but as it actually stands today.
2. **Check the box only if you can answer with confidence** — gut feel or assumption doesn't count.
3. **Score yourself** — one point per checked item, out of 10.
4. **Read your result below** and decide what to do next.

One rule: Don't skip questions that feel uncomfortable. Those are undoubtedly the ones that matter most.

The Checklist

- ☐ I can describe the client's problem in one sentence — and they've confirmed it
- ☐ I know who the final decision-maker is and what they care about most
- ☐ I know who could block this — and I have a plan
- ☐ I understand the budget reality (range, process, timeline)
- ☐ I know the client's decision criteria — not just what they said, but what they actually weight
- ☐ My recommended approach is specific to this client, not copy-pasted from a previous proposal
- ☐ I've addressed the main red flags from the Control Letter
- ☐ I've had at least one conversation where the client said something that surprised me
- ☐ I know what happens next if they say yes — and I've told them
- ☐ I'm ready to walk away if the conditions aren't right

Score: ___ / 10

Score below 7 - Stop. Don't write the proposal yet.

Your score tells you something important: there are critical unknowns in this deal that a polished proposal won't fix. Sending it now would likely result in silence, a vague "we'll consider it," or a price negotiation you're not positioned to win.

What to do: Go back to your last client interaction. Identify which unchecked items you can realistically close in the next conversation. Ask the questions you've been avoiding.

Score 7-8 - You can draft, but don't send yet.

You have a solid foundation, but there are 2–3 gaps that could come back to bite you. Drafting now is fine — it can help you clarify your thinking — but mark the open questions explicitly, and don't hit send until you've closed them.

What to do: Write the draft. Wherever you have a gap, flag it in the text: *"TBC — need to confirm budget timeline with sponsor."* Then schedule one more client call before submitting.

Score 9-10 – You're ready. Write the proposal.

You've done the pre-sales work. You understand the deal, the people, and what it will take to close. A well-written proposal at this stage is much more likely to move forward — because it reflects reality rather than wishful thinking.

What to do: Write it. Keep it specific to this client. Make it easy for the decision-maker to say yes.

Why These 10 Questions?

Each item on this list maps to a pattern of failure — a recurring reason why deals don't close even when the solution is strong.

- **"I can describe the client's problem in one sentence — and they've confirmed it"** — Without this, your proposal solves a problem *you* diagnosed, not one the client owns. Proposals that solve unconfirmed problems get shelved.
- **"I know who could block this — and I have a plan"** — Champions lose authority. Budget holders disappear. Someone always has veto power. If you don't know who that is, you're flying blind.
- **"I'm ready to walk away if the conditions aren't right."** — This one changes everything. When you're willing to walk, your questions are sharper, your positioning is cleaner, and clients feel the difference.

These aren't theoretical checklists. They come from real pre-sales engagements — the kind where a missed question early in the process costs weeks of work and a deal worth hundreds of thousands.

Want to Go Deeper?

This checklist is drawn from **VCPS — Value-oriented Consulting Pre-Sales**, a 2-day intensive training for IT consultants and pre-sales professionals.

In VCPS, you work through six structured worksheets using real cases from your own pipeline — including the full Proposal Prompter (Worksheet 5) that this checklist is based on.

If this checklist surfaces gaps you're not sure how to close, that's exactly what the training is for. → Learn more at https://learnsynth.net/trainings/vcps