Benefit-Focused Title for [Customer Name]

Date

[Client Logo]

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# Summary

Thank the buyer for the opportunity to submit the proposal. Draw your reader in with an interesting fact or insight about their situation and the opportunity that is in front of them. Explain briefly how your offering will help them achieve their goals or solve their problems.

# Needs Identification

Summarize their situation and need for a solution, and highlight the consequences of not achieving their goals or eliminating their problems.

Keep it focused on the buyer, not on you.

# Proposed Solution

State the objective. Provide an explanation of how your offering will solve each of their problems. This is important – do not merely list your products and/or services and expect the buyer to do the hard work of figuring out how/why it’s the best option for their situation. If there are multiple solutions you are offering, break each out into its own specific sub-section, which makes it easier for your buyer to read, digest and understand your proposal.

## Solution #1

State the objective and how your offering will help them achieve their goal or solve their problem. Define any requirements, and list any deliverables.

## Solution #2

State the objective and how your offering will help them achieve their goal or solve their problem. Define any requirements, and list any deliverables.

## Solution #3

State the objective and how your offering will help them achieve their goal or solve their problem. Define any requirements, and list any deliverables.

# Roadmap

Summarize the methodology. Provide a timeline of events, milestones, products, services and/or deliverables.

List any caveats to the schedule, such as the buyer’s responsibilities.

# Why Choose [Your Company Name]

Clearly state the top benefits of your offerings. Describe your competitive advantages. Provide data-based ROI projections for your offerings – it’s not enough to merely state your offerings are the buyer’s best option. You should aim to prove it to them through numbers. This will make it much more likely that they will purchase your offerings over those of the competition.

# About [Your Company Name]

Provide a few paragraphs with an overview of your business. State your differentiators. If needed, provide team member specific qualifications. Provide in-depth, trust-building information, including client testimonials, case studies, references, awards, industry-leadership positions, etc. If you work with large, highly recognizable companies, include their logos as representative of your experience.

# Price

Provide a cost breakdown of each offering and explain your payment terms.

|  |  |  |
| --- | --- | --- |
| Item | Price | Payment Terms |
| Offering #1 | $ |  |
|  |  |  |
| Offering #2 | $ |  |
|  |  |  |
| Offering #3 | $ |  |
|  |  |  |
| Total | $ |  |

List any guarantees or return policies. Specify any costs that will be the buyer’s responsibility, such as travel expenses or any other reimbursable expenses.

Explain any steps required to commence the project or finalize the sale.

# Conclusion

Summary of their situation and the top benefits to choosing your offerings. Include company and/or sales rep contact information.

***NOTES TO THE AUTHOR OF THE PROPOSAL:***

* Remember to spell-check your proposal prior to submitting it to the buyer.
* If possible, have a second pair of eyes review the proposal prior to submitting it to the buyer.
* Make sure that you are using fonts, colors and formatting consistently throughout the proposal.
* Aim to complete the proposal early, so that you can put it away and then come back to it for a final review with a fresh mind, prior to submitting it to the buyer. Review it from the perspective of the buyer – is it highly compelling?
* Double check that you’ve added the buyer’s logo to the proposal.
* Double check that the buyer’s company name is always spelled correctly throughout the proposal, and that you have not accidentally listed a different buyer anywhere in the proposal (from copying/pasting pieces from a prior proposal, etc.).
* Auto-generate the Table of Contents using your word processor’s functionality rather than trying to cobble it together manually. Double check that the Table of Contents accurately reflects the final contents and associated page numbers.
* Double check the formatting throughout the proposal.
* Double check your pricing.
* Convert your proposal to PDF format prior to submitting to the buyer.