SALES

PROPOSAL

Objective of Proposal

Date:

**Table of Contents**

[**Statement of Confidentiality**](#_heading=h.1fob9te)

**& Non Disclosure**  3

**Executive Summary 3**

**1.**[**Business Background 4**](#_heading=h.3znysh7)

**2,**[**Identification of Needs**](#_heading=h.2et92p0) **6**

[2.1 [RECEIVING PARTY NAME] Requirements 6](#_heading=h.tyjcwt)

[2.2 Additional Requirements 7](#_heading=h.3dy6vkm)

[2.3 Assumptions 7](#_heading=h.1t3h5sf)

[2.4 Needs Identification 7](#_heading=h.4d34og8)

[2.5 Project Outlook 8](#_heading=h.2s8eyo1)

[**3. Proposed Solution**](#_heading=h.17dp8vu)

[3.1 Objectives 9](#_heading=h.3rdcrjn)

[3.2 Solution 9](#_heading=h.26in1rg)

[3.2.1 Deliverables 9](#_heading=h.lnxbz9)

[3.2.2 Requirements vs. Solution 9](#_heading=h.35nkun2)

[3.2.3 [PROJECT TITLE] Team 10](#_heading=h.1ksv4uv)

[**4. Why Choose [YOUR COMPANY NAME]?**](#_heading=h.44sinio) 11

[4.1 Benefits of Our Proposed Plan 11](#_heading=h.2jxsxqh)

[4.2 Competitive Advantages 11](#_heading=h.z337ya)

[4.3 Team Qualifications 12](#_heading=h.3j2qqm3)

[4.4 Success Stories 12](#_heading=h.1y810tw)

[**5. Implementation Plan**](#_heading=h.4i7ojhp) **13**

[5.1 Methodology 13](#_heading=h.2xcytpi)

[5.2 Production Schedule 13](#_heading=h.1ci93xb)

[5.3 Testing & Evaluation 13](#_heading=h.3whwml4)

[5.3.1 Performance metrics 14](#_heading=h.2bn6wsx)

[**6. Costs OR Budget 15**](#_heading=h.qsh70q)

[6.1 Breakdown of Costs 15](#_heading=h.3as4poj)

[6.2 Payment Terms 16](#_heading=h.1pxezwc)

[6.3 Guarantees 16](#_heading=h.49x2ik5)

[**7. Conclusio**](#_heading=h.2p2csry)**n 17**

[**Annexure A 18**](#_heading=h.147n2zr)

[**Annexure B 19**](#_heading=h.3o7alnk)

[**Annexure C**](#_heading=h.23ckvvd) **20**

This document contains confidential information. All data submitted to [RECEIVING PARTY] is provided in reliance upon its consent not to use or disclose any information contained herein except in the context of its business dealings relating to [YOUR COMPANY NAME]. The recipient of this document agrees to inform current and future employees of [RECEIVING PARTY] who view or have access to the contents of its confidential nature.

The recipient agrees to instruct each employee that they do not have the authority to disclose any information concerning this document to others except to the extent that such matters are already known to, and are available for use by, the public. The recipient also agrees not to duplicate or distribute or permit others to duplicate or distribute any material contained herein without [YOUR COMPANY NAME]'s express written consent.

[YOUR COMPANY NAME] retains all title, ownership and intellectual property rights to the material and trademarks contained herein, including all supporting documentation, files, marketing material, and multimedia.

BY ACCEPTANCE OF THIS DOCUMENT, THE RECIPIENT AGREES TO BE BOUND BY THE AFOREMENTIONED STATEMENT.

# Signed \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# RECEIVING PARTY

# Executive Summary

[YOUR COMPANY NAME] is pleased to present [RECEIVING PARTY NAME] with a proposal for the [SPECIFY NAME] project. We understand the [PROBLEM or NEED] that [RECEIVING PARTY NAME] is facing and recognise the unique opportunity to [DESCRIBE IDEA OF HOW TO SOLVE PROBLEM OR NEED].

We believe that the [SPECIFY] market is at its optimum growth or maturing stage and that we are uniquely positioned to successfully [SPECIFY].

Having considered and examined your requirements, we are confident that our proposed plan of action/solution will address your needs effectively.

Our goal is to [OUTLINE OBJECTIVE(S)] by [OUTLINE STRATEGY or SOLUTION] and to complete this by [DATE], for a total rate/price of [AMOUNT].

We believe by implementing our [STRATEGY or SOLUTION], [RECEIVING PARTY NAME] will:

* [LIST BENEFITS ]
* [LIST BENEFITS ]

It is our unique ability to [DESCRIBE SKILLS], and our successful track record in [MENTION RELEVANT EXPERIENCE] that makes us first choice for this project.

We look forward to forming a mutually rewarding relationship with [RECEIVING PARTY NAME].

# 1. COMPANY BACKGROUND

Founded in [DATE] by [FOUNDERS OR GROUP], [TENDERER]is the maker of the popular [SPECIFY]/offers [DESCRIBE SERVICES] services. Our [PRODUCT/SERVICE] is known for [SPECIFY]. We have been quite successful in [SPECIFY] and notably in [SPECIFY RELEVANT ACCOMPLISHMENTS].

[YOUR COMPANY NAME] currently serves over [NUMBER] customers in [SPECIFY REGION OR MARKET] and employs [NUMBER] people in the greater [CITY] area. It has won many acclaimed awards for its [PRODUCT/SERVICE].

**Mission Statement:**

The company’s mission is to [SPECIFY].

`

**[SERVICES PROVIDED or PRODUCTS]:**

* [LIST YOUR PRODUCTS/SERVICES]
* [LIST YOUR PRODUCTS/SERVICES]

**Offices Locations:**

* [CITY] (Headquarters)
* [CITY]

**[CERTIFICATIONS or ACCREDITATIONS or MEMBERSHIPS]:**

* [CERTIFICATION or ACCREDITATION or MEMBERSHIP]
* [CERTIFICATION or ACCREDITATION or MEMBERSHIP]

**Award(s) [LIST BELOW]:**

* [AWARD]

**Last year's financial results [OPTIONAL]:**

* Revenues: [AMOUNT IN CURRENCY]
* Profit: [AMOUNT IN CURRENCY]

For a detailed look at key employees please see section 4.3 "Team Qualifications".

[ADDITIONAL OPTIONAL ELEMENTS:

* Company history
* Legal structure
* Organisational chart
* Board of directors
* Principal shareholders
* Financial projections]

# 2. IDENTIFICATION OF NEEDS

## 2.1 [RECEIVING PARTY NAME] Requirements

[YOUR COMPANY NAME] understands the requirements to be as such:

General Requirements:

* [STATE REQUIREMENTS]
* [STATE REQUIREMENTS]

Technical Requirement(s):

* [STATE REQUIREMENTS]
* [STATE REQUIREMENTS]

Reporting/Monitoring Method(s):

* [METHOD]
* [METHOD]

Evaluation Method(s):

* [METHOD]
* [METHOD]

Timeline Requirement(s):

| **Proposal Submittal** | **Supplier Selection** | **Project Start** | **Initial Review** | **Project Completion** |
| --- | --- | --- | --- | --- |
| [DATE] | [DATE] | [DATE] | [DATE] | [DATE] |

Cost Requirement(s):

| **Monthly Budget** | **Total Budget** | **Budget Overrun Penalty** |
| --- | --- | --- |
| [AMOUNT] | [AMOUNT] | [AMOUNT] |

## 2.2 Additional Requirement(s)

[YOUR COMPANY NAME] has identified the following requirements that should be met in order to successfully complete this project:

* [ADDITIONAL REQUIREMENT]
* [ADDITIONAL REQUIREMENT]

## 2.3 Assumption(s)

The following assumptions were made when preparing this proposal:

* [ASSUMPTION]
* [ASSUMPTION]

## 2.4 Needs Identification

[RECEIVING PARTY NAME] has the following needs: [SPECIFY].

After analysing different scenarios and taking into account the strengths and expertise of both companies, we see the following [NUMBER] potential solution(s):

1. [SPECIFY SOLUTION]
2. [SPECIFY SOLUTION]

Market trends, notably [SPECIFY TRENDS], have shaped our proposed solution as described in section 3.2. [YOUR COMPANY NAME] will be crucial in helping [RECEIVING PARTY NAME] reach its [MARKET AUDIENCE], address its clients' needs and stave off the threat of [SPECIFY MARKET/COMPETITIVE THREATS].

[ADDITIONAL OPTIONAL ELEMENTS:

* Company SWOT analysis (Strengths / Weaknesses / Opportunities / Threats)
* Competitive landscape
* Barriers to entry

## 2.5 Project Scope

This project will involve over [NUMBER] [RECEIVING PARTY NAME] employees and require the coordination of [SPECIFY] departments in offices in [SPECIFY CITIES].

The successful implementation of [SPECIFY YOUR SOLUTION], will dramatically effect [SPECIFY] and [SPECIFY].

Please view [ANNEXURE X] for a diagram illustrating the overall workflow and scope of the project.

# 3. PROPOSED SOLUTION

## 3.1 Objectives

We have analysed the present situation and believe the following objective(s) must be achieved:

* [SHORT DESCRIPTION OF OBJECTIVE]

## 3.2 Solution

[DETAILED DESCRIPTION OF YOUR INTENDED STRATEGY AND THE SOLUTION THAT WILL HELP ACHIEVE IT]

[EXPLANATION OF HOW YOUR SOLUTION WILL HELP REACH OBJECTIVES WHILE ADDRESSING REQUIREMENTS]

### 3.2.1 Deliverables

In the course of this project, we will deliver the following:

* [LIST THE MAIN PRODUCT DELIVERABLES]
* [LIST THE MAIN PRODUCT DELIVERABLES]

### 3.2.2 Requirements vs. Solution

The following table shows how each requirement will be addressed:

| **Requirements** | **Solutions** | **Deliverables** |
| --- | --- | --- |
| [SHORT DESCRIPTION] | [EXPLAIN HOW SOLUTION ADDRESSES REQUIREMENT] | [SPECIFY THE RELATED DELIVERABLE] |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

**Table 1. [PROJECT TITLE] Requirements & Solutions**

### 3.2.3 [PROJECT TITLE] Team

This project will be overseen by [NAME], [TITLE]. He OR she will be in charge of [SPECIFY] and will manage the work done by the following teams:

* Team A – Manager: [NAME], [TITLE]

Members: [NAME], [TITLE]

Main Task(s):

* + 1. [TASK 1]
* Team B – Manager: [NAME], [TITLE]

Members: [NAME], [TITLE]

Main Task(s):

* + 1. [TASK 1]
* Team C – Manager: [NAME], [TITLE]

Members: [NAME], [TITLE]

Main Task(s):

* + 1. [TASK 1]
    2. Why Choose [YOUR COMPANY NAME]

## 4.1 Benefits of Our Proposed Plan

When comparing our capabilities and proposed solution to that of competitors, the benefits of choosing [YOUR COMPANY NAME] are:

* [LIST THE BENEFITS OF USING YOUR SOLUTION, e.g. improvement in business model, High ROI, monthly cost savings, short time to completion, service reliability, and lower implementation cost]

## 4.2 Competitive Advantages

The following are competitive advantages that differentiate [YOUR COMPANY NAME] from other providers:

[USE RELEVANT DIFFERENTIATING FACTORS & COMPETITIVE ADVANTAGES]

* **Company Recognition**

[SHORT EXPLANATION OR SUBSTANTIATING EVIDENCE FOR EACH]

Brand awareness

Brand image

Brand identity

Industry recognition

Trust

[OTHER]

* **Expertise & Stability**

[SHORT EXPLANATION OR SUBSTANTIATING EVIDENCE FRO EACH]

Highly knowledgeable workforce

Skilled labour

Technological skills

Powerhouse solution

High-level standard

Stability

[OTHER]

* **Technology**

[SHORT EXPLANATION OR SUBSTANTIATING EVIDENCEOR EACH]

Performance

Flexibility

Scalability

Reliability

Features and functionality

[OTHER]

* **History of success**

[SHORT EXPLANATION OR SUBSTANTIATING EVIDENCE FOR EACH]

Steady growth in sales

Successful track record

Adaptability

Loyal client base

* **Customer Service**

[SHORT EXPLANATION OR SUBSTANTIATING EVIDENCE FOR EACH]

First-class service

24/7 support

Client input

* **[OTHER]**

## 4.3 Team Qualifications

**Key Team Member(s):**

**[NAME], [TITLE]**

[SHORT RESUME HIGHLIGHTING RELEVANT SKILLS/EXPERIENCE]

For complete resume of key employees, please see [ANNEXURE X].

## 4.4 Success Stories

[YOUR COMPANY NAME] has worked on analogous projects in the past and has successfully [SPECIFY]. Most notable relevant experiences include [SPECIFY PROJECT] where we have [LIST ACCOMPLISHMENTS], [SPECIFY PROJECT] where we have [LIST ACCOMPLISHMENTS] and [SPECIFY PROJECT] where we have [LIST ACCOMPLISHMENTS].

For more detailed examples, please see [ANNEXURE X] and [X] respectively.

For our full client list, please see [ANNEXURE X].5. Implementation Plan

## 5.1 Methodology

We have the opportunity to follow the [SPECIFY 1st], [SPECIFY 2nd], [SPECIFY 3rd] methods of work in this project. The deliverables shall be provided OR produced according to the following methodology because of [SPECIFY ADVANTAGES]: [DESCRIBE METHODOLOGY]

ADDITIONAL OPTIONAL ELEMENTS:

* Technical implementation details
* Product testing and beta phases
* Staff training
* Downtime
* Recovery & emergency plans

## 5.2 Production Schedule

In order to begin this project we first need to [SPECIFY]. It will then be possible to proceed with [SPECIFY] which will allow us to [SPECIFY]. We expect to complete this project in [NUMBER] [DAYS or WEEKS or MONTHS or YEARS] or in [NUMBER] man-hours. The production schedule is summarised in the table below.

| **Activity ID** | **Activity** | **Dependency**  (ID of related activity) | **Duration** | **Start Date** | **Progress Report or**  **Midpoint Review** | **End Date** |
| --- | --- | --- | --- | --- | --- | --- |
| 1 | [SHORT DESCRIPTION] | [ID] | [NUMBER OF DAYS or MAN-  HOURS] | [DATE] | [DATE] | [DATE] |
| 2 |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |
| 4 |  |  |  |  |  |  |
| 5 |  |  |  |  |  |  |
| 6 |  |  |  |  |  |  |
| 7 |  |  |  |  |  |  |
| 8 |  |  |  |  |  |  |
| 9 |  |  |  |  |  |  |
| 10 |  |  |  |  |  |  |

**Table 2. Proposed Production Schedule**

## 5.3 Testing & Evaluation

Product testing phases should debut when [SPECIFY POINT IN TIME] and should ensure the successful [IMPLEMENTATION or FUNCTIONING] of the following elements: [SPECIFY CRITICAL SUCCESS FACTORS].

Evaluation will take place on a [DAILY/WEEKLY/MONTHLY] basis.

[EVALUATION METHOD 1] will be used to evaluate [SPECIFY]. [EVALUATION METHOD 2] will be used to evaluate [SPECIFY]. [EVALUATION METHOD 3] will be used to evaluate [SPECIFY].

The following reports will be produced on a [DAILY/WEEKLY/MONTHLY] basis: [SPECIFY REPORTS].

[OPTIONAL] Please see [ANNEXURE X] for project evaluation criteria.

### 5.3.1 Performance metrics

The following metrics should be used to measure the success and progress of this project.

[THE FOLLOWING ARE EXAMPLES OF METRICS AGAINST WHICH YOU CAN EVALUATE DELIVERABLES OR THE PROJECT AS A WHOLE]

* Past results
* Industry benchmarks or averages
* Set goals and requirements
* Desired improvements in production levels, quality or cost
* Behavior based

Increases attendance or clientele

Number of website visitors, length of stay, depth of navigation, number of clicks

Number of calls received

Number of complaints

Change in customer behavior/buying patterns

Etc.

* Cost-based

Conversion rate (proportion of customers who perform a specific action)

Cost per new client acquisition/cost per sale

RETURN OF INVESTMENT (ROI)

Production costs

Etc.

* Based on brand variables

Customer satisfaction level

Customers’ impression of brand/product

Brand awareness/recognition levels

Customer loyalty levels

Etc.

* Hybrid (combination of above elements)

# 6. Costs OR Budget

## 6.1 Cost Breakdown

Based on our analysis of your needs and the nature our proposed solution, the total funds required are estimated at: [AMOUNT]. The cost breakdown is detailed in the table below.

Estimated man-hours: [NUMBER OF HOURS] (does not include breaks and non-working days).

Total estimated project duration: [NUMBER OF HOURS or DAYS or MONTHS].

Estimated daily cost: [AMOUNT].

[THE FOLLOWING ARE EXAMPLES OF COSTS, ALL MAY NOT APPLY TO YOUR SITUATION]

| **Cost Element** | **Amount** |
| --- | --- |
| Machinery And Equipment |  |
| Raw Materials |  |
| Production & Overhead |  |
| IT Infrastructure (Hardware/Software) |  |
| Labor  Project Manager  General Managers  Team A  Team B  Team C  Payroll Taxes |  |
| Intellectual Property (e.g. trademarks, domain names, patents)  Permits & licenses |  |
| Marketing |  |
| Order processing & billing |  |
| Third Party Services |  |
| Training |  |
| Annual/Monthly Maintenance Fee |  |
| Travel |  |
| Utilities (e.g. long distance communications, fax, internet connection) |  |
| Freight/Delivery |  |
| Postage |  |
| **Total** | **0,000,.00 [IN CURRENCY]** |

**Table 3. Cost Breakdown for [PROJECT TITLE]**

## 6.2 Payment Terms

All equipment, production and general costs (e.g. travel expenses), and man-hours used to complete this project will be billed. This proposal provides an estimate of total costs. All amounts exceeding this quotation are subject to the approval of [RECEIVING PARTY NAME].

Payments shall be made [30 DAYS AFTER RECEIPT OF INVOICE or SPECIFY SCHEDULE]. An initial amount of [AMOUNT] is required to start the project. All late payments are subject to a [1.5% MONTHLY or SPECIFY] charge or the maximum permitted by law.

A discount of [SPECIFY] % shall be applied to early payments.

Payment must be remitted by [CASH, BANK WIRE, CERTIFIED CHECK or SPECIFY] and must be made payable to [TENDERER LEGAL NAME].

## 6.3 Guarantees

[YOUR COMPANY NAME] shall offer the following guarantees:

e.g.

* + [PROJECT or SPECIFIC ELEMENT] will be completed by [DATE].
  + If [YOUR COMPANY NAME] exceeds total cost estimate by [AMOUNT], it will be subject to a penalty fee of [AMOUNT] % of exceeding amount.
  + [SPECIFY ELEMENT] will adhere to [SPECIFY] quality standards; if this is not the case [YOUR COMPANY NAME] will be subject to a penalty of [AMOUNT].

# 7. Conclusion

[YOUR COMPANY NAME] is confident that our proposed [SPECIFY] strategy will [SUMMARISE BENEFITS OF YOUR SOLUTION]. We sincerely hope that [RECEIVING PARTY NAME] will consider us as a long-term partner and allow us to enter into a mutually beneficial relationship. We are available to answer any questions you may have and look forward to discussing this opportunity further.

After reviewing this document, the following steps should be performed in order to come to a final agreement.

1. Submission of questions/suggestions
2. Counter proposal or approval by [RECEIVING PARTY NAME]
3. Negotiation of fees, terms, clauses and conditions

We declare this offer to be binding and free of errors or omissions. Due diligence has been performed in order to ensure compliance with your requirements and particular situation. We agree to hold our proposal open for acceptance until [DATE].

Thank you for your interest.

Sincerely,

[TENDERER NAME]

[TITLE]

[COMPANY NAME]

# Annexure A

**Examples of elements to include in appendices:**

* Supporting information, e.g. third-party studies, quotations, research and test results
* Project diagrams.
* Finance projections and supporting calculations
* Success stories: information about analogous projects completed for other firms and their results
* Testimonials from clients, letters of reference, newspaper clippings, press releases as well as reviews
* Accreditations and certifications
* Employee resumes
* Company milestones
* Terms and conditions
* Limitation of liabilities
* Applicable law to the project in question
* Disclaimer

# Annexure B

**Examples of elements to include in appendices:**

* Supporting information, e.g. third-party studies, quotes, research or test results
* Project workflow diagrams or installation schematics
* Financial projections or supporting calculations
* Success stories: information about similar projects you have completed for other firms and their results
* Testimonials from clients, letters of reference, newspaper clippings, press releases and reviews
* Accreditations and certifications
* Employee resumes
* Company milestones
* Additional terms and conditions
* Limitation of liability
* Applicable law
* Disclaimer

# Annexure C

**Examples of elements to include in appendices:**

* Supporting information, e.g. third-party studies, quotes, research or test results
* Project workflow diagrams or installation schematics
* Financial projections or supporting calculations
* Success stories: information about similar projects you have completed for other firms and their results
* Testimonials from clients, letters of reference, newspaper clippings, press releases and reviews
* Accreditations and certifications
* Employee resumes
* Company milestones
* Additional terms and conditions
* Limitation of liability
* Applicable law
* Disclaimer

