

Writing and creating proposals isn't fun, that's why I created these samples – to save you time. I hope you like them!

-Ruben

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<Client Company/Logo>

June 12, 2012

For: <Your Name>

By: <Client Name>

Bidsketch

General Instructions: Follow the italicized instructions for each section below to create your own persuasive sales consulting proposal. Do your best to limit your proposal to 4-5 pages or less, as this should be all you need to identify the client's problem, propose your services as the solution to that problem, and help the client understand all the ways your services will benefit them. Emphasize that your consulting services will leave the client with something more than just temporary advice or improvement; you'll be giving them tools/systems to strengthen relationships with their customers and make more sales into the future.

Meeting Your Needs

Instructions: If the client is thinking about bringing in an outside sales consultant, something's not going right for the client's business; use the first paragraph to identify that problem or frustration. Then use 3-4 bullet points to break down different services you'll provide to help the client overcome that problem or frustration. Begin each bullet point with an "action word." Finally, use the paragraph after the bullet points to talk about the negative consequences that will happen if the client doesn't fix the problem.

In today's competitive [INDUSTRY] market, {client_name} needs to use all the tools at its disposal to maximize its sales opportunities and keep its pipeline full of new prospects. {client_name} needs an efficient, systematized sales process to:

- Capitalize on every sales opportunity
- Identify and eliminate inefficiencies where prospects are slipping through the cracks
- Foster a sales culture that attracts – and keeps – the most talented salespeople

If {client_name} doesn't invest in a formal sales process tailored to meet its unique needs, it risks losing market share to well-organized competitors.

Delivering Results

Instructions: Use 3-4 bulleted sections to describe positive results your services will create for the client. Focus on major results you think the client will value the most. Spend a few lines after each result you list to 1) describe why the result is helpful to the client's business; and 2) break down the actions you'll take to create that result for the client.

{my_company}'s sales consulting services will deliver the following results for {client_name}:

- **Develop and implement a streamlined sales process** – Having an efficient process in place eliminates any guesswork about how to generate the most sales. We'll provide you with a blueprint that guides you through the entire spectrum of the sales relationship, from generating leads to managing repeat customers.
- **Cultivate an agile, motivated sales force** – An efficient, well-organized sales force can be your most valuable asset. We'll evaluate what you're doing now, and then we'll offer constructive advice to make your sales force more effective, whether it's reorganizing its structure or creating a compensation scheme that rewards excellence.
- **Strengthen relationships with clients across the board** – We believe solid relationships are the foundations that support any successful business. Keeping that in mind, we'll share strategies with you to help you make a positive impression on new prospects, as well as strengthen your relationships with existing customers.

Recommendations for Your Company

Instructions: Use this section to break down which of your consulting services will solve the client's problem. Under each service, talk about: 1) what you'll do to carry that service out; and 2) how those actions will benefit the client. Don't be afraid to recommend additional services beyond the client's project specifications if you believe the services will help the client fix their problem.

To meet {client_name}'s goals, as outlined above, we recommend the following services as part of this project:

Development of a Formal Sales Process

A formal sales process allows you to systematically manage business opportunities. {my_company} develops this process for you based on a quantitative analysis of your costs, competitors, and customer profile. This customized solution keeps your pipeline of prospects full and ensures your sales force uses its limited resources for the most profitable effect.

Analysis of Current Sales Strategies and Advice to Improve Them

{my_company} will visit {client_name}'s business personally and observe the current sales

process there from start to finish. Then, relying on those firsthand observations and an outside perspective, {my_company} will analyze any inefficiencies and offer actionable advice about how to fix them.

Sales Force Training and Counsel

{my_company} will determine how to structure your sales force, its ideal size, and where to assign talent to generate the most profits. We will also use our expertise to train your sales force for maximum efficiency. To ensure that our services meet {client_name}'s needs, {my_company} includes benchmarking and measurement in every contract.

Your Investment

Instructions: Estimate a price for your service package and come up with a label for it that describes a clear benefit to the client. Breaking down your services into 3 or 4 chronological phases (if applicable) will help the client understand what will happen when, as well as make your solution appear valuable. Keep the breakdown at a high level and don't break down your price; you'll need to modify this if your consulting agreement is performance-based or handled with a monthly retainer.

Service Item	Cost
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<p>Increasing Sales Performance and Long-term Profitability Solution</p> <p>Discovery and sales process analysis – We’ll take a look at how much money you’re spending, what your competitors are up to, and your target customer profile to figure out what’s working well and which areas have the potential for improvement.</p> <p>Development of a formal sales process – Using what we learn in our analysis, we’ll create a customized system for your sales team to implement that generates consistent leads, turns prospects into buyers, and one-time customers into long-term business partners.</p> <p>Sales force training and counsel – We’ll meet with your sales executives to deliver our recommendations to improve sales force efficiency. We’ll also meet with all the members of your sales team and brief them on how to implement our sales process in the best way.</p>	\$
Total	\$

Why Choose {my_company}?

Instructions: Use this section to talk about the special value you can add to the client’s business that no other sales consultant can. In the first paragraph, describe what the client will save or get (time, money, and better relationships with their biggest customers are all good options) if they hire you. Break down your company’s most compelling assets into bullet points and emphasize why those assets are important for the client’s business.

{client_name} wants to excel in every aspect of its business, but it can’t afford to lose momentum by only focusing on sales without facing pressure from its competitors. That’s why

you want a company like {my_company} to provide you with a solution to maximize your sales without compromising your time and strengths. Our expertise, resources, and deep commitment to our craft make us the ideal choice to meet {client_name}'s needs for a sales solution. We'll bring the following strengths to our work for {client_name}:

- **{my_company} only hires experienced salespeople** – Everyone on our team brings real-world experience to the table. We're doers, not theorists. This wealth of knowledge offers us a unique perspective into the strategies that work and those that don't; we want to share the most effective ones with you.
- **{my_company} has expertise in a wide range of industries** – Our team has worked with clients in industries ranging from software and professional services to defense contracting and biotech. We've distilled what works, and we can provide an invaluable perspective regardless of your current stage of business development.
- **{my_company} focuses on helping you strengthen relationships with customers old and new** – We understand running a successful business is all about relationships. Certain "key accounts," comprising roughly 20% of your customers, generate 80% of your sales. We'll help you maintain relations with those key accounts and expand them long into the future. But we don't neglect the crucial importance of leaving new prospects with a good impression, so our sales strategies cover all the bases.

Project Timeline

Instructions: Use this chart to break down your consulting services into chronological phases. Describe what each phase entails in the "activities" section and give an estimated completion date for each phase. You might not need to use this section for short, one-off jobs, but most consulting projects run for long enough time to make this section useful.

Should {client_name} choose {my_company} to execute this solution as proposed, our timeline for this project is as follows:

Phase	Activities	Completion
Discovery	Analysis of {client_name}'s costs, competition, customer profile and sales process.	07/31/XX

Sales Process Development	Comprehensive strategy development to guide every aspect of the selling process, from lead-generation to follow-ups and managing existing customers.	08/21/XX
Sales Force Training and Management	Consultations with senior executives and the sales team in which {my_company} will share its findings with the attendees, offer actionable advice, and field any questions.	09/05/XX

Next Steps

Instructions: This is your “call to action” section. Make a limited offer that expires on a certain date, which motivates the client to act. Use bullet points to specify exactly what the client has to do to accept your offer. Finally, tell the client what will happen immediately after they accept the offer to set expectations.

As outlined in the Investment section, our pricing is valid until [DATE]. To take advantage of this proposal and proceed with the project as outlined, {client_name}'s next steps must be to:

- Accept the proposal as-is
- Discuss desired changes with {my_company}
- Finalize and sign the contract
- Submit an initial payment of 50 percent of total project fee

Once completed, {my_company} will contact {client_name} to schedule a project launch meeting to make introductions and gather information before beginning the work.

We're happy to make changes to project scope on {client_name}'s request at any time, but may be subject to additional billing.

Terms and Conditions

Instructions: This section protects you from potential legal liability. Use it to talk about who owns

your work product, whether you'll be able to use portions of it on your website as examples, and how legal proceedings will go down if something goes wrong. Have an attorney look it over to give you guidance on how to apply it to your specific business.

Once the project fee is paid in full to {my_company}, any elements of text, graphics, photos, contents, trademarks, or other artwork furnished to {client_name} for inclusion in website are owned by {client_name}.

{my_company} assumes {client_name} has permission from the rightful owner to use any code, scripts, data, and reports are provided by {client_name} for inclusion in its materials, and will hold harmless, protect, and defend {my_company} from any claim or suit arising from the use of such work.

{my_company} retains the right to display graphics and other web content elements as examples of their work in their portfolio and as content features in other projects.

This agreement becomes effective only when signed by agents of {client_name} and {my_company}. Regardless of the place of signing of this agreement, {client_name} agrees that for purposes of venue, this contract was entered into in [STATE] and any dispute will be litigated or arbitrated in [STATE].

The agreement contained in this contract constitutes the sole agreement between {client_name} and the {my_company} regarding all items included in this agreement.