Sales Proposal Template

1. Cover Sheet (when binding or printing) with confidentiality statement on this page or next one

2. Table of Contents (may not be necessary)

3. Executive Summary – one to two pages maximum. The purpose of this summary is to clearly state the problem, the impact of the problem, the recommended solution, the impact of the solution, the investment, and the next steps. This section of the proposal is the most important to the business executives.

4. Project Technical Brief – one to two pages about the technical details of the project. This is where you can list all of the options for the solution, illustrations of the end product, and any relevant charts. Link to the Detailed Scope of Work, if applicable.

5. Financial Investment -- no more than two pages. You may choose to put a timeline here or in the Technical Brief.

   a. Three options with clever, creative titles – highlight the one you recommend

   b. Support contract options for the end product

   c. Payment terms matched to milestones for the project

6. Deliverables – these are the measures of success for the project. Make sure they are clearly specified and measurable – there should not be any phrase such as "meets with the approval of the customer". Match a timeline to these.

7. Customer Responsibilities and Assumptions about the Project – This is an area where you have the opportunity to detail what you need in order to be successful and what you understand, technically, about it.

   a. "Services Not Covered by this Proposal" – Companies often do not list what is *not* going to be provided. This section is especially important if subjective matters, such as visual design, are involved. Sometimes this can be combined with the "Assumptions" section. An example of language in this section is: "our company will provide up to three prototype designs. Any designs above and beyond these three will be subject to a fee of ___."

8. Signature Page – both parties and initials on each page

9. "Client Viewable" Scope of Work – does not contain any "secret sauce" and I only recommend this *if* the customer requires it as part of the proposal. This would be the

full scope of a detailed project. If the work is simple, the Project Technical Brief may be enough. This is where you include wireframes, sketches, functional specs, etc.

10. Company Marketing Materials relevant to the proposal

11. Terms & Conditions

When building the proposal here are some ideas to keep in mind:

- Recommend one of the project options in the Executive Summary

- Every proposal should list why your company's proposal is different than other companies bidding on the project. If you do not know if your delivery will be different, then you may choose to exclude this.

- Always number your pages

- Could proposals have guarantees?

- Could proposals have penalties for being late and bonuses for being early?

- Print proposals on a nice paper stock and FedEx a copy to the people who are on the decision committee

- Could you add graphic sketches of the product you provide in the project (if the project size warrants it)? This could really separate your proposals from many businesses. Add the buyer's name to the product sketch so its branded.

- Don't forget charts and lists of benefits. They draw one's eye to key information in a sea of prose and can be reused in presentations to the customer/prospect.

- Present the proposal in person or via web conferencing when possible (see below for more information)

- Add some color. This should come in the illustration, but that's not the only place. Use colored headers, charts, etc. Colors communicate emotion and style. The just-released Office 2007 does a good job allowing one to be creative even if you are not normally the creative type.

- Have samples of deliverables ready to show a customer/prospect. These are wonderful visual aids to help set expectations and lower the sense of risk. For instance, many projects state that you will provide documentation. What sort of documentation? How does it look? Speaking of documentation, is the primary operator of the product a native English speaker?)

- When offering training, offer to record it and deliver it on DVD or through the web. If you do this, you will again set yourself apart without great expense. If you choose to

deliver it through the web, you can use the web page to also make the person aware of your other services and news.