# Sales Proposal Template

Purpose

The purpose of this tool is to help you write a concise sales proposal for prospective customers.  Effective proposal demonstrate understanding of needs and a clear solution, pricing and delivery timeframe.

[Insert your Logo here]

Sales Proposal

[Insert date]

Company Name
Company Address Line 1
Company Address Line 2

Phone Number
Fax Number
Website Address

Prepared For:
Prepared By:
Date:

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## 1. Executive Summary

Briefly outline the challenges your firm can help the prospective organization solve. Provide a concise summary of your solution's key deliverables, project timelines, pricing, and any other relevant information to influence decision-makers who may only read this part.

## 2. Our Understanding

### 2.1 Your Company

Paraphrase prospect's corporate overview from their website.

### 2.2 Your Needs

Provide a brief description of the prospect's needs. Consider using a bulleted list that is prioritized from critical needs to value adds.

Prioritized list of needs:
Need 1
Need 2
Need 3

### 2.3 Decision Criteria

Decision, including service level agreements, warranties, professional services, delivery timelines, etc.

| Key Decision Criteria | Importance (High, Med, Low) |
|---|---|
| 1. Service Level Agreement | High |
| 2. Pricing | Med |
| 3. Available before June 1st | High |

## 3. Our Approach

### 3.1 Our Company

Provide a concise summary of your organization, including competitive advantages or differentiation from key competitors.

### 3.2 Our Solution

Outline an integrated solution that aligns to the prospect's decision criteria and includes key deliverables, professional services, service level agreement, and project delivery timelines.

3.2.1 Key Product/Service Offering
List the key components of your product/service and relate the features to the prospect's need to demonstrate value.

Professional Services
Communicate how you will help with implementation.

3.2.3 Service Level Agreement
Insert your standard service level agreement.

3.2.4 Project Delivery Timelines
Provide a Project Schedule that includes timelines, deliverables, milestones, and checkpoints.

3.3 Action Plan
Create a step-by-step Action Plan that illustrates how your solution will be implemented. Align to the prospect's purchasing process.

Step 1 – provide clarity on this step in the process.
Step 2 - provide clarity on this step in the process.
Step 3 – Provide clarity on this step in the process.
Step 4 - provide clarity on this step in the process.
Step 5 - provide clarity on this step in the process.

4. Pricing & Terms

4.1 Price
Provide pricing details and purchasing options. Be sure to include any additional expenses such as travel for professional services staff.

4.2 Terms
State the terms and conditions for the deal.

5. Contact Information

5.1 Headquarters
Provide the address and contact information for your headquarters.

5.2 Account Manager
Provide the contact information for the Account Manager

### 5.3 VP Sales

Provide the contact information for the VP Sales.

## 6. Appendix

### 6.1 Additional Information

Provide any additional information such as a service level agreement, satisfaction guarantee, customer references, testimonials etc.