

<<Company>>  
<<Address1>>  
<<Address2>>  
<<City>>, <<State>> <<PostalCode>>  
  
(PH) <<WorkPhone>>  
(FX) <<Fax>>  
<<Domain>>



<<ProposalTitle>>

<<CurrentDate>>

**Prepared for:** <<CustFirst>> <<CustLastName>>  
<<CustTitle>>

**Prepared by:** <<FirstName>> <<LastName>>  
<<JobTitle>>



<<Insert description here>>

Proposal Number: <<ProposalNumber>>



# EXECUTIVE SUMMARY

## The Objective...

<<Include a purpose statement that covers the problem and the central idea. Restate the clients needs as determined by reading their RFP or your previous interview process.>>

- ◆ **Need #1:** << Insert need # 1 statement here >>
- ◆ **Need #2:** << Insert need # 2 statement here >>
- ◆ **Need #3:** << Insert need # 3 statement here >>

## The Opportunity...

<<Include the major points of analysis and identify the opportunity. Restate the clients goals you identified previously (via RFP, interview, etc.).>>

- ◆ **Goal #1:** << Insert goal # 1 statement here >>
- ◆ **Goal #2:** << Insert goal # 2 statement here >>
- ◆ **Goal #3:** << Insert goal # 3 statement here >>

## The Solution...

<<Include recommendations for both a solution and the steps required for action. Summarize what you are proposing to do and how you are going to do it to meet the goals. The full recommendation page can be added and expanded on. See the Recommendations proposal document template.>>

- ◆ **Recommendation #1:** << Insert recommendation # 1 statement >>
- ◆ **Recommendation #2:** << Insert recommendation # 2 statement >>
- ◆ **Recommendation #3:** << Insert recommendation # 3 statement >>





# COST SUMMARY

| <b>Development Costs</b>                  | <b>Price</b>       |
|---|--------------------|
| Project Development                       | << Insert Cost >>  |
| License Fees                              | << Insert Cost >>  |
| Equipment Costs                           | << Insert Cost >>  |
| << Insert cost types here >>              |                    |
| <b>Total Development Costs:</b>           | << Insert total >> |
| <b>Ongoing Yearly Costs</b>               |                    |
| Other Service Fees                        | << Insert Cost >>  |
| << Insert cost types here >>              |                    |
| <b>Total Ongoing Yearly Costs:</b>        | << Insert total >> |
| <b>Ongoing Monthly Costs</b>              |                    |
| Maintenance costs / monthly and/or yearly | << Insert Cost >>  |
| 3rd Party Services                        | << Insert Cost >>  |
| << Insert cost types here >>              |                    |
| <b>Total Ongoing Monthly Costs:</b>       | << Insert total >> |
| <b>Miscellaneous Costs:</b>               |                    |
| Training                                  | << Insert Cost >>  |
| Travel                                    | << Insert Cost >>  |
| Marketing & Services                      | << Insert Cost >>  |
| Shipping/Handling                         | << Insert Cost >>  |
| << Insert cost types here >>              |                    |
| <b>Total Miscellaneous Costs:</b>         | << Insert total >> |
| <b>TOTAL AMOUNT</b>                       | << Insert total >> |
| <b>TOTAL MONTHLY AMOUNT</b>               | << Insert total >> |
| <b>TOTAL YEARLY AMOUNT</b>                | << Insert total >> |

**Standard Disclaimer:** The numbers represented above are to be used as an estimate for the projects discussed. The above Cost Summary does in no way constitute a warranty of final price. Estimates are subject to change if project specifications are changed or costs for outsourced services change before being locked in by a binding contract.

No matter how small or large your proposal must be, Proposal Packs include all you need to assemble your proposal in one affordable and convenient package.

This sample PDF file shows you three templates (Title Page, Executive Summary and Cost Summary) out of the entire collection of **over 270 templates included in each Proposal Pack.**

50 complete sample proposals are also included with each Proposal Pack to illustrate how to assemble and write your own custom proposal.

See our web site for the complete collection of Proposal Pack styles:

<http://www.proposalkit.com/html/packs.htm>

Using one Proposal Pack style and assembling your selected templates you can create many types of business proposals covering technical and non-technical proposals and product/service proposals for any type of industry.

Editable templates, samples and instructions are included in each Proposal Pack for creating:

- **General business proposals**
- **Technical proposals**
- **Government grant proposals**
- **Non-technical proposals**
- **Product sales proposals**
- **Services proposals**
- **Grant funding proposals**
- **Business plan funding proposals**
- **Book publishing proposals**
- **Letter proposals**
- **Sales letters**
- **Short form agreements and quotes**
- **Resumes**
- **Buying/selling a business proposal**



The retail version of each Proposal Pack style includes the editable versions of these templates. Each style is sold separately and each style includes the complete collection of **over 270 templates** (i.e. Title Page, Executive Summary, Cost Summary, Benefits, Features, Resume, etc.). Using these templates you can create proposals ranging from one page to hundreds of pages in length depending on your needs (the average proposal uses 5 to 30 of these templates). Guidelines, examples and complete sample proposals are provided for various types and sizes of proposals.

The following templates are included in each Proposal Pack style:

**Introduction Templates:**

Inquiry Letter, Proposal Cover Letter, Business Plan Cover Letter, Grant Cover Sheet, Profile, Title Page, Table of Contents, Non-Disclosure (long form and short form)

**Client-centered Templates:**

**(Summary Section)**

Executive Summary, Client Summary, Abstract, Cost Summary, Estimate, SWOT Analysis, Process Summary

**(Needs Assessment Section)**

Needs Assessment, Strengths, Weaknesses, Opportunities, Threats, Competitive Analysis, Location Analysis, Industry Trends, Client Background, Client Operations, Market and Audience, Clients Served

**Project-centered Templates:**

**(Goals and Objectives Section)**

Goals and Objectives, Statement of Work, Expected Results, Benefits, Features, Samples, Project Deliverables, Milestones, Operational Impact, Significance

**(Methodology Section)**

Merchandising, Outline, Background, Project Methods, Sales Plan, Disaster Recovery Plan, Technical Approach, Architecture, Production Schedule, Implementation Plan, Project Management, Data Management, Marketing Plan, Testing Plan, System Integration, Installation Schedule, Time Line, Schedule of Events, Training Plan, Maintenance Plan, Maintenance Schedule, Security Plan, Safety Plan, Regulations, Certificates, Permits and Licenses, Assumptions, Storyboard Diagrams, Legal Considerations, Legal Documents, Risk Analysis, Contingencies, Contingency Planning, Projections, Project Constraints, Customer Support, Activities, Design, Planning, Approach, Innovativeness, Project Plan, System Plan, Promotion, Site Planning, Environmental, Public Relations, Community, Coordination, Responsibilities, Documentation, Authority

**(Evaluation Section)**

Evaluation, Specifications, System Requirements, Performance Requirements, Requirements, Documentation Requirements, Interface Requirements, Acceptance Criteria, Measures of Success, Dissemination

**(Budget Section)**

Funding Request, Future Funding, Budget, Project Budget, Monthly Budget, Annual Budget, Price List, Total Cost of Ownership, Cost/Benefit Analysis, Return on Investment, Supplied Material, Materials, Equipment, Hardware and Software, Work Order #1, Work Order #2, Payment Schedule, Contract and Terms, Financing, Budget

Information, Wholesale Price List, Retail Price List, Cost Effectiveness, Resources, Hourly Services Contract, Invoice, Memorandum of Understanding

**(Project Summary Section)**

Recommendations, Project Summary

**Your Company-centered Templates:**

**(Qualifications Section)**

Mission Statement, Qualifications, Quality Control, Case Study, Company History, Services Provided, Consulting, Products, Product Visuals, Additional Services, Additional Products, Logistics, Listings, Comparison Chart, Future Developments, Research and Development, Testimonials, References, Awards and Achievements, Portfolio, Facilities, Company Operations, Process Management, Administration, Programs and Activities, Strategic Position, Acquisitions, Financial Statement, Financial Information, Balance Sheet, Current Year Balance Sheet, Income Projection, Breakeven Analysis, Profit and Loss Statement, Current Year Profit and Loss Statement, Cash Flow Analysis, Cash Flow Analysis (3 Year), Startup Capital, Source of Funds, Use of Funds, Sustainability, Repayment Plan, Collateral and Guarantees, Disclosures, Exit Strategy, Distribution, Our Clients, Constituency, Assets, Capital Assets, Partnerships, Sponsors, Investors, Advisors, Advisory Board, Board of Trustees, Personnel, Customer Service, Subcontracts, Tax Status, Legal Structure, Ownership, Litigation, Insurance, Officers and Board, Executive Bio, Resume, Authors Bio, By-laws, Organizational Structure, Credentials, Capabilities, Accreditations, Certifications, Geographic Information, Key Positions, Contractors, Legal Eligibility, Authorization, Board of Directors, Policies

**Appendix Templates:**

Compliance Matrix, RFP Cross Reference, Standards Compliance, Schematics, Definitions, List of Acronyms, List of Illustrations, Benchmark Results, Reference Material, Related Documents, Financial Statements, Credit History, Outstanding Debts, Disclaimers, Warranty, Provisions Compliance, Commitment Letters, List of Supporters, Letters of Reference, Agreements and Contracts, Studies, Feasibility Study, Interviews, Bonding Documents, Committees, Federal Forms, Memberships, Flow Chart, Board Resolution, Contact Letter, Letter of Transmittal, Support Letter, Commitment Letter, Collaboration Letters, Report, Tab, Worksheet, Supplied Form, Appendix A, Appendix B, Appendix C, Appendix D, Appendix E, Appendix F, Appendix G, Appendix H, Appendix I, Appendix J

**Presentation Templates:**

Envelope, Letterhead, Fax Cover Letter

**Additional Templates:**

10 Blank all-purpose templates, Follow-up Letter, Follow-up Status Request Letter

**Checklists:**

Proposal Development Checklist, Post-Proposal Analysis Checklist, Proposal Status Tracking Spreadsheet, Task Assignment Process Report Spreadsheet, Bid / No-Bid Checklist, Grant Proposal Development Checklist

## Proposal Samples (over 500 pages of sample material):

Samples illustrate how any business in any industry can use a Proposal Pack to create their business proposals.



### Sample Proposal Collection

- Large Website and CD-ROM Sample Proposal
- CD-ROM Production Sample Proposal
- Small Business Website Sample Proposal
- Micro Business Website Sample Letter Proposal
- PowerPoint Presentation Sample Proposal
- Accounting and Payroll Services Proposal
- CD-ROM Marketing Materials Creation Proposal
- PBX Phone System Service and Sales Proposal
- Caterer Proposal
- Corporate Identity Proposal
- Human Resources Consulting Services Sample Proposal
- Technology Consulting Services Sample Proposal
- Janitorial Services Sample Proposal
- Product Sale Sample Proposal
- Personal Resume Sample Proposal
- Book Publishing Proposal
- Technology Business Plan Proposal
- Educational Grant Proposal
- Retail Location Business Plan Proposal
- Educational Grant Proposal #2
- Multilingual Web Site & DVD Proposal
- Company Rebranding Proposal
- Non-profit Support Proposal
- Software Automation Proposal
- Research Assistant Proposal
- Web Site Creation and Software Integration Project
- Commercial Office Real Estate Lease Proposal
- Property Management Services Proposal
- Real Estate Land Development Proposal
- Real Estate Property Sales Services Proposal
- Commercial Real Estate Broker Proposal
- Real Estate Investment Funding Proposal
- Lawn Care and Landscaping Services Proposal

- Event Party Planner Services Proposal
- Corporate Event Planner Services Proposal
- Security Services Proposal
- Photography Services Proposal
- Contractor Home Remodel Services Proposal
- Commercial Contracting Office Remodel Proposal
- Custom Home Building Proposal
- DOE Federal Government Grant Proposal
- DOE Federal Government Grant Proposal #2
- DOH Federal Government Grant Proposal
- DOJ Federal Government Grant Proposal
- DOJ Federal Government Grant Proposal #2
- EPA Federal Government Grant Proposal
- EPA Federal Government Grant Proposal #2
- HHS Federal Government Grant Proposal
- HHS Federal Government Grant Proposal #2
- USDA Federal Government Grant Proposal

Tens of thousands of businesses and freelancers in over 100 countries use Proposal Packs to create their proposals.

There are over 140 Proposal Pack graphic styles to choose from. The differences between each style are in the colors, fonts and accent graphics. You can see each style has the same text, templates and layout, just different graphics for the visual look. Other differences may be found in page border colors, bullet point styles and text accent colors. Select a Proposal Pack graphic theme that best suits your style.

Contact us if you have any questions:

<http://www.proposalkit.com/htm/contact.htm>

\*\*\* To improve the download time of this PDF sample, the graphics have been compressed and will not be the high resolution quality of the retail versions.