

 Use **Proposal Pack Wizard** to merge your data and manage your documents

<<Company>>  
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Many variations of this graphic are included: "Project", "Proposal", "Contract", "Estimate", "Plan", "Business Plan", "Presentation", "Quote", "Report", "Response", "Resume", "Study", "Submission"

<<ProposalTitle>>  
 <<CurrentDate>>

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

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



**Original artwork is also included so you edit the graphics and text**

<<Insert description here>>



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Proposal Number: <<Pr

**Many filled in sample proposals are also included for a wide variety of business situations which help you write your own**

**Hundreds of editable templates like these are included with this design theme integrated into every page**



<<Domain>>



# 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 >>





<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.

# Proposal Packs



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 600 templates included in each Proposal Pack.**

Over 100 complete sample proposals (over 1200 pages of additional material) 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/htm/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
-  Government contracts
-  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
-  Business documents
-  Complex reports, studies, plans



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 600 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.

These templates are included in each Proposal Pack style:

**Introduction Templates:**

Inquiry Letter, Cover Letter, Cover Letter (Business Plan), Cover Sheet, Cover Sheet (Government Contracts), Profile, Title Page, Table of Contents, Non-Disclosure Form (Long Version), Non-Disclosure Form (Short Version)

**Client-centered Templates:**

**(Summary Section)**

Introduction, Forward, Executive Summary, Client Summary, Abstract, Cost Summary, Product Cost Summary, Services Cost Summary, Project Cost Summary, Quote, Estimate, SWOT Analysis, Process Summary, Customer Information, Importance, Getting Started

**(Needs Assessment Section)**

Needs Assessment, Strengths, Weaknesses, Opportunities, Threats, Challenges, Competitive Analysis, Location Analysis, Industry Trends, Present Situation, Forecast, Growth Areas, Client Background, Client Operations, Observations, Market Study, Market and Audience, Population, Clients Served

**Project-centered Templates:**

**(Goals and Objectives Section)**

Goals and Objectives, Short Term Objectives, Long Term Objectives, Targets, Statement of Work, Scope, Expected Results, Benefits, Features, Advantages, Accessibility, Project Deliverables, Delivery Date, Milestones, Improvement, Operational Impact, Economic Impact, Significance, Solutions

**(Methodology Section) - Plans**

Sales Plan, Disaster Recovery Plan, Project Plan, System Plan, Production Plan, Implementation Plan, Integration Plan, Content Management Plan, Marketing Plan, Site Planning, Communications Plan, Testing Plan, Expansion Plan, Transition Plan, Conversion Plan, Training Plan, Maintenance Plan, Security Plan, Safety Plan, Compliance Plan, Contingency Plan

### **(Methodology Section) – Actions**

Project Initiation, Project Methods, Approval, Procedures, Activities, Exercises, Initiatives, Negotiations, Representation, Modeling, Prototyping, Simulations, Virtualization, Design, Life Cycle, Planning, Transportation, Offshoring, Outsourcing, Purchasing, Procurement, Sourcing and Fulfillment, Warehousing, Merchandising, Approach, Strategy, Technical Approach, Optimization, Resource Allocation, Scheduling, Data Management, Content Management, Promotion, Advertising, Networking, Relocation, Exploration, Retraining, Collaboration, Cooperation, Coordination, Facilitation, Treatment, Assembly, Deployment, Launching, System Integration, Reorganization, Restructuring, Change Management, Coaching, Mentoring, Tutoring, Guidance, Maintenance, Auditing, Licensing, Investment, Risk Analysis, Contingency Planning, Burden Analysis, Consolidation, Disposal, Termination, Preservation, Conflict Management

### **(Methodology Section) – Information**

Outline, Assessment, Breakdown, Categories, Project Background, Techniques, Options, Choices, Alternatives, Comparison, Rankings, Applications, Progress, Layout, Footprint, Sales Cycle, Pricing Model, Delivery Details, Shipping, Handling, Service Area, Territory, Imports, Exports, International, Joint Venture, Phases, Production Schedule, Productivity, Project Management, Project Oversight, Oversight, Reporting, Attendance, Meetings, Agenda, Accelerators, Placement, Conditions, Impact Statement, Public Relations, Media, Coverage, Retention, Turnover, Responsibilities, Documentation, Inputs, Outputs, Modules, Configuration, Mobility, Portability, Installation Details, Installation Schedule, Dependencies, Time Line, Schedule of Events, Scalability, Extensibility, Flexibility, Interoperability, Curriculum, Prerequisites, Careers, Nominations, Maintenance Schedule, Repairs, Upgrades, Updates, Security, Regulations, Rules, Storyboard, Legal Considerations, Recovery, Fault Tolerance, Contingencies, Projections, Project Constraints, Obligations, Limitations, Vulnerabilities, Restrictions, Complications, Barriers, Obstacles, Exemptions, Obsolescence

### **(Methodology Section) – Things**

Samples, Technology, Architecture, Supplied Material, Resources, Materials, Tools, Equipment, Hardware and Software, Affiliates, Infrastructure, Operating Environment, Environmental, Entities Affected, Presenters, Participants, Certificates, Permits and Licenses, Legal Documents, Dividends

### **(Methodology Section) – Concepts**

Concepts, Prevention, Innovativeness, Synergies, Conservation, Stewardship, Community, Culture, Revitalization, Empowerment, Authority, Assumptions

### **(Methodology Section) – Specialties**

Franchising, Construction, Engineering, Manufacturing, Packaging, Brand Development, Tourism, Job Creation, Entertainment, Customer Support

### **(Evaluation Section)**

Evaluation, Analysis, Analytics, Specifications, System Requirements, Performance Requirements, Specification Requirements, Requirements, Site Specific Requirements, PO Note Requirements, Lead Time Requirements, Internal Requirements, External Requirements, Documentation Requirements, Interface Requirements, Test Requirements, Accuracy, Measurements, Inspection, Selection Criteria, Acceptance Criteria, Execution, Measures of Success, Efficiency, Dissemination, Monitoring, Accountability

### **(Financial Section) - Current**

Financial Statement, Financial Information, Current Year Balance Sheet, Sales Figures, Revenue, Profit Margin, Current Year P&L Statement, Cash Flow Analysis, Capital, Startup Capital, Operating Costs

### **(Financial Section) – Future**

Income Projection, Breakeven Analysis, Balance Sheet, Profit and Loss Statement, Cash Flow Analysis (3 Year), Sources of Funds, Uses of Funds, Line of Credit, Funding Request, Future Funding, Budget Information, Budget, Project Budget, Monthly Budget, Annual Budget, Cost Effectiveness, Total Cost of Ownership, Cost/Benefit Analysis, Return on Investment

### **(Financial Section) - Offerings**

Labor Rates, Price List, Wholesale Price List, Retail Price List, Price Comparison, Appraisal

### **(Financial Section) – Obligations**

Collateral and Guarantees, Repayment Plan, Work Order (Without Deposit), Work Order (With Deposit), Hourly Services Contract, Invoice, Purchase Order, Payment Schedule, Commissions, Contract and Terms, Terms and Conditions, Memorandum of Understanding, Financing

### **(Project Summary Section)**

Recommendations, Opinions, Project Process Summary, Project Summary, Summary, Conclusions

### **Your Company-centered Templates:**

#### **(Qualifications Section) - Capabilities**

Credentials, Capabilities, Experience, Capacity, Qualifications, Case Study, Company History, About Us, Future Developments, Future Potential, Research and Development, Reliability, Portfolio, Publications, Accreditations, Certifications, Engagement, Executive Bio, Resume, Education, Employment, Authors Bio, Biography

#### **(Qualifications Section) – Offerings**

Company Information, Services Provided, Consulting, Rentals, Products, Products and Services, Product Visuals, Discounts, Incentives, Awarded SINS, Special Attributes, Accessories, Part Numbers, Inclusions, Composition, Compatibility, Functionality, Amenities, Additional Services, Additional Products, Availability, Inventory, Subscriptions, Inventory Management, Logistics, Supply Chain, Listings, Comparison Chart, Facilities, Nationalization, Globalization, Company Operations, Business Development, Process Management, Administration, Membership, Programs and Activities, Scholarships, Internships, Donations, Acquisitions, Distribution, Assets, Claims, Deeds, Intellectual Property, Patents, Capital Assets, Ownership

#### **(Qualifications Section) - References**

Testimonials, References, Referrals, Endorsements, Awards and Achievements

### **(Qualifications Section) – Relationships**

Dealers, Our Clients, Constituency, Suppliers, Partnerships, Sponsors, Donors, Contributions, Investors, Shareholders, Strategic Alliances, Relationships, Experts, Advisors, Advisory Board, Board of Trustees, Personnel, Key Positions, Human Resources, Customer Service, Subcontracts, Contractors

### **(Qualifications Section) – Information**

Geographic Information, Market Share, Strategic Position, Competitiveness, Disclosures, Exit Strategy, Legal Eligibility, Authorization, Tax Status, Legal Structure, Litigation, Insurance, Officers and Board, Board of Directors, Organizational Structure

### **(Qualifications Section) - Beliefs**

Mission Statement, Leadership, Vision, Focus, Entrepreneurship, Principles, Best Practices, Trust, Quality Control, Sustainability, Policies, Policy Statement, Privacy, By-laws

### **Appendix Templates:**

Compliance Matrix, RFP Cross Reference, Revisions, Amendment, Standards Compliance, Protocols, Flow Chart, Schematics, Definitions, Frequently Asked Questions, List of Acronyms, List of Illustrations, Table of Figures, Table of Authorities, Benchmark Results, Reference Material, Bibliography, Works Cited, Related Documents, Financial Statements, Credit History, Outstanding Debts, Disclaimers, Guarantee, Warranty, Provisions Compliance, Board Resolution, Commitment Letters, Collaboration Letters, List of Supporters, Letters of Support, Letters of Reference, Acknowledgments, Agreements and Contracts, Report, Studies, Surveys, Statistics, Correlations, Discoveries, Lessons Learned, Feasibility Study, Interviews, Bonding Documents, Committees, Prospectus, Federal Forms, Memberships, Tab, Worksheet, Supplied Form, General Information, Notes, Miscellaneous, Appendix A, Appendix B, Appendix C, Appendix D, Appendix E, Appendix F, Appendix G, Appendix H, Appendix I, Appendix J, Glossary, Index

### **Presentation Templates:**

Envelope, Letterhead, Fax Cover Letter

### **Miscellaneous Templates:**

10 Blank all-purpose templates

### **Checklists:**

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

## Financial Spreadsheets:

Cost Summary Calculator, Product Cost Summary Calculator, Services Cost Summary Calculator, Project Cost Summary Calculator, Quote Calculator, Invoice Calculator, Purchase Order Calculator, Cash Flow Current Year Calculator, Cash Flow Three Year Calculator, Budget Three Year Calculator, Annual Budget Calculator, Monthly Budget Calculator, Project Budget Calculator, Balance Sheet Current Year Calculator, Balance Sheet Three Year Calculator, Profit and Loss Statement Current Year Calculator, Profit and Loss Statement Three Year Calculator, ROI Calculator Spreadsheet, Cost Benefit Analysis Calculator, Cost of Ownership Calculator, Income Projection Calculator, Breakeven Analysis Calculator, Capital Calculator, Startup Capital Calculator, Operating Costs Calculator, Funding Request Calculator, Future Funding Calculator

## Letters:

Contact Letter, Letter of Transmittal, Follow-up Letter, Follow-up Status Request Letter, Counter Proposal Letter, Support Letter, Commitment Letter, Prospect Thank You Letter, Customer Thank You Letter, Invoice Correction Letter

## Proposal Samples (over 1200 pages of sample material):

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



-  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
-  Healthcare Grant Sample Proposal
-  Environmental Program Sample Proposal
-  Daycare Center Sample Proposal
-  Process Improvement Sample Proposal
-  Sponsorship Sample Proposal
-  Senior Home Care Sample Proposal
-  Energy Efficiency Sample Proposal
-  Environmental Cleanup Sample Proposal
-  Job Share Position Sample Proposal
-  Temp Agency Services Sample Proposal
-  Training Services Sample Proposal
-  Marketing Campaign Services Sample Proposal
-  Software and Hardware System Sample Proposal
-  Employee Security Card Sample Proposal
-  Real Estate Occupancy Sample Proposal
-  Network Cabling Sample Proposal
-  Food Services Catering Sample Proposal
-  Web Hosting Business Plan Sample
-  Painting Contractor Sample Proposal
-  Business Continuity Services Sample Proposal
-  Private Eye Investigation Services Sample Proposal
-  Plumber Services Sample Proposal
-  Heating and Air Conditioning Sample Proposal
-  Roofing Contractor Sample Proposal
-  Wedding Planner Services Sample Proposal
-  Occupational Therapy Services Sample Proposal
-  Transportation Shipping Services Sample Proposal
-  Technical Resume Sample
-  Executive Resume Sample
-  Home Daycare Services Sample Proposal
-  SEO Services Sample Proposal
-  Music DJ Sample Proposal

-  Manufacturing Process Improvement Sample Proposal
-  Import Export Services Sample Proposal
-  Franchise Purchasing Sample Proposal
-  Feasibility Study Sample
-  Electrical Contractor Sample Proposal
-  Church Mission Shelter Sample Proposal
-  Case Study Sample
-  Auction Fundraiser Sample Proposal
-  Business Growth Services Sample Proposal
-  Health and Fitness Program Sample Proposal
-  Electronic Medical Record System Sample Proposal
-  Patent and Invention Licensing Proposal
-  Legal Services Proposal
-  Product Cost Savings Sales Sample Proposal
-  Patenting New Technology Sample Proposal
-  Franchise Selling Sample Proposal
-  Government Contract Product Sales Sample Proposal
-  Government Contract Service Sales Sample Proposal
-  Selling a Web Site and Digital Assets
-  New Sales Office Sample Proposal
-  Charter School Educational Sample Proposal
-  Sale of Business and Assets Sample Proposal
-  Architectural Design Sample Proposal

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

There are over 200 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>