

<<CurrentDate>>

<<CustFirst>> <<CustLastName>>

<<CustTitle>>

<<CustCompany>>

<<CustAddress1>>

<<CustAddress2>>

<<CustCity>>, <<CustState>> <<CustPostalCode>>

Dear <<CustSalutation>> <<CustLastName>>,

<< Every proposal needs a cover letter to introduce yourself or your organization and the information that is enclosed. Briefly describe your intent and why you are submitting the proposal here. If you are responding to a specific advertisement or request for proposal, be sure to mention the ad or RFP by name or identifying code. For example, you might write “The Travis Corporation is pleased to submit this proposal in response to your RFP for digital video editing services posted on the DVED Association’s listserve on June 28, 20XX.”>>

<< Briefly state your unique selling proposition (USP) that solves the customer’s problem and optionally hook them with anything extra you thought of. For example, if you represent a landscaping company, you might write “Why choose our landscape services over others? We’ve been in business for twelve years and we have hundreds of satisfied customers who will tell you why. See the included Testimonials page to read a few of their opinions.” Another example for a company that installs HVAC systems: “You’ll find our proposed strategy for updating your HVAC systems to be both economical and ecological—we use only the most modern ‘green’ techniques for all our projects.”>>.

<< If you are including time-sensitive information such as prices or schedules, state how long this proposal will be valid (e.g., “All information included here is guaranteed valid until June 30 of this year”) and specify who is the primary contact person between the client and your company (e.g., “For additional information or questions, please contact me at the number or email address listed below”>>

<< Add a call to action statement asking the reader to review your attached proposal and approve it. >>

We strongly believe our proposal has been thoroughly outlined and will meet or exceed all of your expectations and requirements. We will call you to schedule a meeting on << Insert Date >>. Thank you for your consideration and for putting your trust in <<Company>>.

Sincerely,

<<FirstName>> <<LastName>>

<<JobTitle>>

<<Company>>

<<WorkPhone>>

<<Email>>

<<Domain>>

This is an example of a document assembled by the Proposal Pack Wizard software you would start editing for your proposal if you were not going to use the AI Writer.

[See the AI Writer features](#)



PROPOSAL

<<ProposalTitle>>

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

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

This is an example of a document assembled by the Proposal Pack Wizard software you would start editing for your proposal if you were not going to use the AI Writer.

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INTRODUCTION

<< Use the Introduction section to introduce your proposal. Give a brief statement of the overall context of the proposal to lead the reader into what is being proposed. For example, you can start with the current state of a situation and the difficulties being encountered or the need to be fulfilled. >>

<< Outline the project in general terms. This should be brief: no longer than two or three paragraphs. Summarize information from your Needs Assessments, Recommendations and Goals and Objectives pages to build this section. >>

<< For example, you might write something like the following paragraphs:

“Your request is for an innovative program to teach critical thinking skills to high school students. We believe that you’ll agree that we have designed a learning program that is both functional and fun. When your students use our methods, they’ll get excited about analyzing the world around them.”

“As an example, our “Who Said THAT?” module teaches students to research who writes internet blogs and why. Even our video modules show students how to look for clues about the opinions behind the piece. Teachers can use our lessons individually or in combination to fit into a variety of schedules, so both your faculty and your students will be satisfied. You’ll find the details of our content and the way our system works described in the following sections.” >>

<< Explain your qualifications and capabilities for fulfilling the requirements of the project (e.g., “Our company has constructed more than forty-five tilt-up buildings under schedule and under budget.”). >>

<< For a complex proposal, give a brief summary of the arrangement of the following proposal pages to help the reader easily find important information. Give the reader a preview of what to expect. For example, you might write “The Executive Summary will provide you with a brief but informative overview of our proposal, while the following sections give you all the details you need. Be sure to review the Strategic Alliances section; you’ll be pleased to discover how far our expertise and influence extends within the industry.” >>



EXECUTIVE SUMMARY

<< An executive summary should present the highlights of your proposal in concise language and should present information in the same order as it appears in your proposal. Some reviewers may not read beyond the executive summary, so ensure that the information you provide is easily understood, sounds attractive to the reviewer, and accurately represents your ideas. Save technical language and detailed information for other pages within your proposal. >>

<< Insert a pull quote here that will be in emphasized text >>

The Objective...

<< Include a purpose statement that covers the problem and the central idea. This shows the reviewer that you have thoughtfully considered the specific issues. Restate the client's needs as determined by reading their RFP or reviewing your previous interview notes. For example, you might write something like "Verix, New Hampshire needs a plan to recycle plastics" or "Alder Grove Academy seeks a study program that will give its students the same science and mathematics training received by students in Japan." >>

- **Need #1:** << Insert need #1 statement here (e.g., "Identify which plastic types can be economically recycled." or "Identify discrepancies between Alder Grove's programs and Japan's programs."). >>
- **Need #2:** << Insert need #2 statement here (e.g., "Create a plan to gather recyclable plastics from residents" or "Create new competitive math and science programs for Alder Grove Academy."). >>
- **Need #3:** << Insert need #3 statement here (e.g., "Create a plan to deliver recyclable plastics to recyclers" or "Implement new math and science programs at Alder Grove Academy."). >>

The Opportunity...

<< Include the major points of analysis and identify the opportunity. Restate the client's goals you identified previously (via RFP, interview, etc.). For example, you might write something like "Recycling plastics will save Verix, NH, over \$40,000 per year in garbage costs" or "Improved math and science programs will allow Alder Grove's graduates to better compete with students from Japan." >>

- **Goal #1:** << Insert goal #1 statement here (e.g., "Reduce volume of garbage that cannot be composted" or "Match math education by grade to Japanese programs."). >>
- **Goal #2:** << Insert goal #2 statement here (e.g., "Reduce litter along Verix's roads" or "Match science education by grade to Japanese programs."). >>



- **Goal #3:** << Insert goal #3 statement here (e.g., “Allow Verix to qualify as a Green Community” or “Graduate students who have passed the same math and science exams as graduating Japanese students.”) >>

The Solution...

<<Include recommendations for both a solution and the steps required for action. This is one of your chances to include a call to action to recommend to the client what they need to do. 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 template. For example, you might write something like “Our company operates a plastic recycling program in Hogan, New Hampshire, only ten miles from Verix, and we can expand our operations to include Verix.” or “Our company has expertise in developing education programs both in the U.S. and in Japan, and we can tailor our Japanese math and science programs to meet Alder Grove Academy’s needs.” >>

- **Recommendation #1:** << Insert recommendation #1 statement (e.g., “Expand plastic collection program to Verix” or “Tailor Japanese math and science programs to Alder Grove Academy’s school year and grades.”). >>
- **Recommendation #2:** << Insert recommendation #2 statement (e.g., “Educate Verix residents about new plastic recycling requirements” or “Educate instructors and administrators about how to implement the new programs.”). >>
- **Recommendation #3:** << Insert recommendation #3 statement (e.g., “Implement new plastics recycling program in Verix” or “Implement new math and science programs in Alder Grove Academy.”). >>

Summary

<< Insert an optional summary statement that ties all of the bullet point elements together. >>



EFFICIENCY

<< Use this template to discuss any sort of efficiency. For example, you might discuss the economic efficiency of a proposed plan or the energy efficiency of a new device, or compare the material efficiency of various construction plans to determine which represents the most ecological choice. You might evaluate the efficiency or effectiveness of your current computer system. It's good business practice to periodically analyze the efficiency of your marketing efforts and other business strategies. Efficient use of resources—which may mean finances, personnel, physical resources, or even time—is an important topic for many proposals. >>

<< Introduce the topic of efficiency here. Why is it important to your proposal? Then go on to elaborate on the important points below. >>

- << **Efficiency Point #1 (e.g., “Our process produces less waste than our competitors” or “Our printed advertising reaches only 45% of our intended audience”)** >>

<< Elaborate on this point. Include all pertinent details, such as specifics about how and why a product, service, or process succeeds or fails in reaching efficiency goals. >>

- << **Efficiency Point #2** >>

<< Elaborate on this point. >>

- << **Efficiency Point #3** >>

<< Elaborate on this point. >>

- << **Efficiency Point #4** >>

<< Elaborate on this point. >>

- << **Efficiency Point #5** >>

<< Elaborate on this point. >>

Conclusions

<< Add your conclusion here. Are you recommending one product or service over another? Do you have suggestions for improving efficiency? What should be the next step in your process? >>



<< Use this template to describe how your organization and/or your project will be environmentally responsible. This could be especially important when describing packaging or manufacturing processes, or when describing various types of services that might impact the environment. >>

<< Introduce the concept of environmental responsibility (being eco-friendly) here, and explain why you think this is important in the context of your proposal. Then explain below what you do to protect the environment. >>

● << **Eco-friendly factor #1 (e.g., “All products are shipped in recycled paper containers, which can be recycled again after unpacking.”) >>**

<< Describe any important details here, such as how this benefits the environment or the consumer, or saves in terms of expense. >>

● << **Eco-friendly factor #2 >>**

<< Describe any important details here, such as how this benefits the environment or the consumer, or saves in terms of expense. >>

● << **Eco-friendly factor #3 >>**

<< Describe any important details here, such as how this benefits the environment or the consumer, or saves in terms of expense. >>

Summary

<< Insert an optional statement here to summarize the topic of being eco-friendly. >>



SERVICES PROVIDED

<< Use this page to list the services you propose to provide to your client. This page is a summary page that can be used as checklist in comparison to competitors, so make sure the list is complete and accurate. Provide only a brief name and description here and refer to other pages in your proposal as needed. Examples provided below are for an internet hosting company. >>

● << Insert Service #1 (e.g., “24/7 Customer Support Service”) >>

<<Insert brief description (e.g., “Our technical experts are always available to assist customers via our toll-free number. See the Customer Service page for details about our representatives’ training and the many types of support we offer.”)>>.

● << Insert Service #2 (e.g., “Templates for Easy Website Creation”) >>

<<Insert brief description (e.g., “All our hosting packages include a line of pre-designed website templates that customers can use for fast, easy website creation. We are constantly adding to this template collection: to view our current offerings, visit our website.”)>>.

● << Insert Service #3 >>

<<Insert brief description>>.

● << Insert Service #4 >>

<<Insert brief description>>.

● << Insert Service #5 >>

<<Insert brief description>>.

● << Insert Service #6 >>

<<Insert brief description>>.

Notes

<< Insert any special notes, instructions or other information needed. >>





<<Company>> produces the following products to be considered for this project. We believe <<CustCompany>> will benefit from the use of these products.

<< Insert descriptions of all of your relevant products and how they will benefit the customer in this project. >>

● << Insert Product Name #1 >>

<< Insert description of the product. >>

<< Insert description of how the product will benefit the prospective client in this project. >>

<< Insert description of how this product is better than other competitive products. Consider adding the Case Studies template and referencing how your product has been used in similar situations. >>

● << Insert Product Name #2 >>

<< Insert description of the product. >>

<< Insert description of how the product will benefit the prospective client in this project. >>

<< Insert description of how this product is better than other competitive products. Consider adding the Case Studies template and referencing how your product has been used in similar situations. >>

● << Insert Product Name #3 >>

<< Insert description of the product. >>

<< Insert description of how the product will benefit the prospective client in this project. >>

<< Insert description of how this product is better than other competitive products. Consider adding the Case Studies template and referencing how your product has been used in similar situations. >>

Summary

<< Insert an optional summary statement that ties all of the bullet point elements together. >>



INSTALLATION DETAILS

<< Use this template to describe the details of the installation you are proposing to do or expecting to have done for you. While many installations are simple, the installation of a large energy, hardware, or software system, or of a large piece of equipment may be quite complex. >>

<< Introduce the topic of installation here and refer to other documents in your proposal as necessary. For example, you might include the installation schedule here or use the Installation Schedule template included in Proposal Pack and then discuss other details here. >>

Pre-Installation Considerations

<< Are there activities that must be completed or notifications that must be made before installation can begin? For example, do you need to make sure a certain space is cleared, permits have been acquired, or the electricity or water supply is turned on or off? Do normal operations need to be paused for installation? List all the pre-installation requirements here. >>

Installation Procedures

<< Describe what will happen during installation. Will unusual equipment or another company's personnel be on site? How long will installation take? What procedures will take place? Will installation involve dangers that require protective equipment, such as excessive noise, hazardous chemicals, or risk of objects falling from overhead? What normal operations may be disrupted or affected by installation? Answer all of these questions here. >>

Post-Installation Considerations

<< If, after installation is judged to be complete, there are other activities that must take place, describe those here. For example, on a construction project, the installation of a power system or a large structure may need to be inspected. There may be cleanup of facilities needed after installation, testing of the new system, or personnel may need to be trained. Describe all post-installation activities here. >>





MAINTENANCE PLAN

After the initial project is completed and accepted <<CustCompany>> may enter into a separate maintenance agreement for ongoing support of the following components.

<<Insert information regarding the systems which are expected to require ongoing maintenance. You may want to enter into a separate contract for providing maintenance support separate from the initial development agreement. For very complex systems consider using a 3rd party Maintenance Tracking System>>

● << Insert Component Requiring Ongoing Maintenance #1 >>

<<Insert description of the maintenance required>>

Maintenance Frequency: <<Insert frequency of maintenance required>>

Cost Estimate: <<Insert cost estimate of maintenance>>

Responsible Party: <<Insert responsible party to perform maintenance>>

● << Insert Component Requiring Ongoing Maintenance #2 >>

<<Insert description of the maintenance required>>

Maintenance Frequency: <<Insert frequency of maintenance required>>

Cost Estimate: <<Insert cost estimate of maintenance>>

Responsible Party: <<Insert responsible party to perform maintenance>>

● << Insert Component Requiring Ongoing Maintenance #3 >>

<<Insert description of the maintenance required>>

Maintenance Frequency: <<Insert frequency of maintenance required>>

Cost Estimate: <<Insert cost estimate of maintenance>>

Responsible Party: <<Insert responsible party to perform maintenance>>

Notes

<< Insert any special notes, instructions or other information needed. >>



COST SUMMARY

| Products | | | |
|-------------|-------|----------|--------|
| Description | Price | Quantity | Amount |
| | | | |
| | | | |
| | | | |
| Subtotal | | | |

| Services | | | |
|-------------|------|-------|--------|
| Description | Rate | Hours | Amount |
| | | | |
| Subtotal | | | |

| Summary | |
|--------------|--|
| Subtotal | |
| Discount | |
| Tax Rate | |
| Sales Tax | |
| Total Amount | |

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.



COMPANY HISTORY

About us - <<Insert information about your company history here>>.

<<Insert your mission statement here>>.

<<Insert your unique selling proposition (USP) here>>.

<<Insert significant industry developments by your company here>>.

<<Insert information about your production capabilities, equipment used and production capacity here>>.

<<Company>> was founded in <<Insert date here>> and employs <<Insert employee count here>> people.

<<Company>> is headquartered in <<Insert headquarter location here>> and has offices in <<Insert additional locations here>>.

Products - <<Insert information about your products here>>.

Services - <<Insert information about your services here>>.

How to Contact <<Company>> - If you need to contact us for any reason you can reach us at:

<<Company>>
<<Address1>>
<<Address2>>
<<City>>, <<State>> <<PostalCode>>
<<Country>>

Phone: <<WorkPhone>>
Fax: <<Fax>>
E-Mail: <<Email>>
URL: <<Domain>>

<<SocialMedia1>>
<<SocialMedia2>>

Client contact: <<Insert team member name here>>
<<Insert team member title here>>
Phone: <<Insert team member phone here>>
Fax: <<Insert team member fax here>>
E-mail: <<Insert team member e-mail address here>>

*<< Insert a pull quote here
that will be in emphasized
text >>*



EXPERIENCE

<< Use this template to describe your experience, or that of your organization. Most often this page would be a description of work experience to be used in a resume or business proposal, but it could also be used to describe experiences of an observer or participant in a scientific trial or other analytical situation. >>

<< Your experience can be organized in many different ways. For a resume, you might want to list company names accompanied by dates worked there, and then describe the job you did in that situation. Or you could list experience types, such as “Management” and then describe the experiences that fit into that category. Or you could even categorize experience by date or by time, if using this document to analyze a specific situation. >>

- << **Experience Category #1 (e.g., “Hardwicke Company, 2003-2009” or “Student Engineering Projects”)** >>

<< Include details about that experience here. You might describe duties, budgets, what was learned, etc. >>

- << **Experience Category #2** >>

<< Include details about that experience here. >>

- << **Experience Category #3** >>

<< Include details about that experience here. >>

- << **Experience Category #4** >>

<< Include details about that experience here. >>

- << **Experience Category #5** >>

<< Include details about that experience here. >>

- << **Experience Category #6** >>

<< Include details about that experience here. >>

Summary

<< Insert any summary statement you have about these experiences here. >>

TESTIMONIALS

The following are testimonials from some of our clients. <<Company>> is dedicated to customer service and producing high quality work that meets the needs of our clients. For more details see our web site testimonial page at:

<< Insert a pull quote here that will be in emphasized text >>

<<Insert URL of your testimonials web page>>

<< Insert Testimonial #1 Name >>

<<Insert client's company name and their title>>

<<Insert the client's testimonial here>>

<<Insert URL to clients site or portfolio page here>>

<< Insert Testimonial #2 Name >>

<<Insert client's company name and their title>>

<<Insert the client's testimonial here>>

<<Insert URL to clients site or portfolio page here>>

<< Insert Testimonial #3 Name >>

<<Insert client's company name and their title>>

<<Insert the client's testimonial here>>

<<Insert URL to clients site or portfolio page here>>

<< Insert Testimonial #4 Name >>

<<Insert client's company name and their title>>

<<Insert the client's testimonial here>>

<<Insert URL to clients site or portfolio page here>>

Summary

<< Insert an optional summary statement that ties all of the bullet point elements together. >>



<<Company>>

<<Address1>>

<<Address2>>

<<City>>, <<State>> <<PostalCode>>

(PH) <<WorkPhone>>

(FX) <<Fax>>

<<Domain>>

<<SocialMedia1>>

<<SocialMedia2>>

