



# PLAN

<<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.

[See the AI Writer features](#)





# TABLE OF CONTENTS

|                            |    |
|----------------------------|----|
| Introduction .....         | 2  |
| Needs Assessment.....      | 3  |
| Goals and Objectives.....  | 4  |
| Security Plan.....         | 5  |
| Site Preparation.....      | 6  |
| Risk Analysis.....         | 7  |
| Contingency Planning ..... | 8  |
| Site Security.....         | 9  |
| Vulnerabilities.....       | 10 |
| Dangers.....               | 11 |
| Security Controls .....    | 12 |
| Evaluation.....            | 13 |
| Policies .....             | 14 |

**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](#)**



# 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.” >>



# NEEDS ASSESSMENT

<<Company>> has identified the following needs which are not being met.

<< Describe the need your company is proposing to fill. This should be an external-looking overview accessing the needs not being met. Describe the need from the viewpoint of who is to benefit from the project. >>

<< Describe why this need is an important one. Show why it is a problem. Narrow your focus of the problem down to where it is local and specific enough to match the solution you are capable of offering. For example, lack of computers in schools does not describe a specific need. Lack of computer skills among students in rural areas of your county relative to the rest of the state would describe a more realistic and defined need. >>

<< Describe how your company can fill that need by offering a solution. You need to make the case that your company is the right choice to provide a solution. >>

## **Needs**

<< Briefly summarize the needs. >>

## **Market**

<< Describe the market that will benefit. If this is not a commercial need, you may change the title from Market to Constituency or Demographics as you see fit. >>

## **Solution**

<< Briefly summarize your solution. >>

## **Sources**

<< List additional sources of information. Additional sources of information can provide more information from independent sources to help strengthen your pitch. >>

## **Studies**

<< Describe any studies done that back up the importance of fulfilling the needs. There is also a Studies template if you need to expand on this subject. >>





# GOALS AND OBJECTIVES

<< Use the Goals and Objectives template to outline what you intend to accomplish and how it will be done. >>

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

<<Company>> has outlined a number of goals to be reached in order to consider the project a success. Each goal has a number of specific objectives to be achieved to meet the goal.

<< Summarize the expected results of the project and how these will be measured. There are additional templates such as Expected Results you can use to expand on these topics. >>

- **<< Goal Title #1 >>**

<< Describe this goal for the project. This is a general, high-level goal description. >>

<< List the objectives that must be achieved to reach this goal. Describe each objective in a clear statement of the tasks to be completed, by whom, by when to reach the goal. >>

- **<< Goal Title #2 >>**

<< Describe this end goal for the project. >>

<< List the objectives that must be achieved to reach this goal. Describe each objective in a clear statement of the tasks to be completed, by whom, by when to reach the goal. >>

- **<< Goal Title #3 >>**

<< Describe this end goal for the project. >>

<< List the objectives that must be achieved to reach this goal. Describe each objective in a clear statement of the tasks to be done, by whom, by when to reach the goal. >>

- **<< Goal Title #4 >>**

<< Describe this end goal for the project. >>

<< List the objectives that must be achieved to reach this goal. Describe each objective in a clear statement of the tasks to be done, by whom, by when to reach the goal. >>

## Summary

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



# SECURITY PLAN

Security is always of primary importance. Listed below are the measures proposed to ensure security on this project.

<< The Security Plan template is used to describe security-related aspects of the project. Security details can be contractor background checks, installation of monitoring systems, encryption of sensitive data, off-site data storage, redundant systems, etc. >>

- << **Security Measure #1** >>

Responsible Party: << Who is responsible >>

<< Description of security issue, areas impacted, vulnerability assessment. >>

<< Specify how compliance is met and maintained in an action plan and how security measures will be adopted. >>

- << **Security Measure #2** >>

Responsible Party: << Who is responsible >>

<< Description of security issue, areas impacted, vulnerability assessment. >>

<< Specify how compliance is met and maintained in an action plan and how security measures will be adopted. >>

- << **Security Measure #3** >>

Responsible Party: << Who is responsible >>

<< Description of security issue, areas impacted, vulnerability assessment. >>

<< Specify how compliance is met and maintained in an action plan and how security measures will be adopted. >>

## Summary

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



# SITE PREPARATION

<< Use this page to discuss the steps in any sort of site preparation. Although the most common usage would be to discuss what must be done to a site for a new construction project, this page might also be used for installations of new equipment such as furnaces or computer systems, or for a discussion of how to prepare areas in galleries or museums for new exhibits. Note that Proposal Kit also includes a Site Planning template that would typically be used to map out positions on the site and make plans for this stage. >>

To prepare the site for << insert what the preparation is for >>, the following steps must be taken:

- << Insert Action #1 (e.g., "Existing Structures Must Be Removed" or "Electrical System Must Be Upgraded") >>

<< Add details as needed to explain this step. You might want to describe who will perform the action, explain how much time it will take, or discuss specifications for the results of this action. For example, after many steps in a construction process, an inspection is required before anything more can be done. >>

- << Insert Action #2 >>

<< Add details as needed to explain this step. >>

- << Insert Action #3 >>

<< Add details as needed to explain this step. >>

- << Insert Action #4 >>

<< Add details as needed to explain this step. >>

- << Insert Action #5 >>

<< Add details as needed to explain this step. >>

## Summary

<< Add a summary statement here to direct the readers to the next step after site preparation is complete. >>



# RISK ANALYSIS

Analysis of potential risks is outlined below. This list of risks is not necessarily a complete list of all possible risks. No guarantee is made that all possible risks have been determined or if determined that the analysis is completely accurate.

<< Insert your assessments of possible risks to the project and client here. A contingency plan would be to have an additional source available to replace that vendor. >>

- << Risk #1 >>

Analysis: << Insert description of the potential risk here, why it is a risk and how great a risk it may be. >>

Resolution: << Insert description of how you intend to account for this possible risk in the project design. >>

Contingency: << Insert description of possible contingencies that can be planned for in the event the risk becomes a reality. >>

- << Risk #2 >>

Analysis: << Insert description of the potential risk here, why it is a risk and how great a risk it may be. >>

Resolution: << Insert description of how you intend to account for this possible risk in the project design. >>

Contingency: << Insert description of possible contingencies that can be planned for in the event the risk becomes a reality. >>

- << Risk #3 >>

Analysis: << Insert description of the potential risk here, why it is a risk and how great a risk it may be. >>

Resolution: << Insert description of how you intend to account for this possible risk in the project design. >>

Contingency: << Insert description of possible contingencies that can be planned for in the event the risk becomes a reality. >>

## Summary

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





# CONTINGENCY PLANNING

Our risk analysis has determined there are contingencies that should be planned for as part of the project design. We feel that <<CustCompany>> is best served by providing a plan which accounts for the eventualities of the real world. The following is our initial assessment of contingencies that should be planned for. No guarantees are made that this list is complete, however we have identified key contingencies that should be planned for.

<< Insert your list of possible contingencies that should be planned for. For example, if the operation of the final project depends on a highly specialized component, there should be a contingency plan in place to have spare parts on hand and trained staff able to make repairs. >>

- **<< Contingency Plan #1 >>**

Cause & Effect: << Insert description of a situation which can cause a problem. >>

Location: << Insert description of component or location where problem can occur. >>

Mitigation: << Insert description of steps that can be taken to help avoid the problem. >>

Resolution: << Insert description of how to resolve the problem if it does occur. >>

- **<< Contingency Plan #2 >>**

Cause & Effect: << Insert description of a situation which can cause a problem. >>

Location: << Insert description of component or location where problem can occur. >>

Mitigation: << Insert description of steps that can be taken to help avoid the problem. >>

Resolution: << Insert description of how to resolve the problem if it does occur. >>

- **<< Contingency Plan #3 >>**

Cause & Effect: << Insert description of a situation which can cause a problem. >>

Location: << Insert description of component or location where problem can occur. >>

Mitigation: << Insert description of steps that can be taken to help avoid the problem. >>

Resolution: << Insert description of how to resolve the problem if it does occur. >>

## Summary

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



# SITE SECURITY

<< Use this template to describe the security issues for a specific site, such as a construction site, meeting site, event site, or corporate campus. This topic would most likely be used in a security proposal or in an event planning proposal. Note that Proposal Pack also includes Venue, Security, and Security Plan templates for your use. >>

<< Introduce the concept of site security here and explain why a specific plan is needed for the site. You may need to provide background information about events taking place on the site or a description of the site to be secured. Then go on to describe below the security topics you feel are necessary to discuss. >>

- << **Site Security Topic #1** (e.g., “An armed guard should monitor each entrance” or “All purses and backpacks must be inspected”) >>

<< Describe here any important details about this topic, including numbers of personnel, equipment needed, schedule, cost, and so forth. >>

- << **Site Security Topic #2** >>

<< Describe here any important details about this topic, including numbers of personnel, equipment needed, schedule, cost, and so forth. >>

- << **Site Security Topic #3** >>

<< Describe here any important details about this topic, including numbers of personnel, equipment needed, schedule, cost, and so forth. >>

- << **Site Security Topic #4** >>

<< Describe here any important details about this topic, including numbers of personnel, equipment needed, schedule, cost, and so forth. >>

## Notes

<< Insert any other pertinent information here. >>



# VULNERABILITIES

<< Use the Vulnerabilities template to discuss the vulnerabilities you have identified for your project or for your client's project. A vulnerability can be anything that another entity could take advantage of—for example, computers and software programs often have vulnerabilities via which hackers can infiltrate and cause damage; car ferries have a vulnerability to high waves because of their open design; and a charitable program funded by only one government agency to provide health care to the poor might be vulnerable to a loss of funding from that government agency. >>

<< Introduce the topic of vulnerabilities here and explain why this topic is important. What is your goal in discussing vulnerabilities? Are you trying to convince your organization or your client to remedy vulnerabilities? You may need to explain how and when you learned about the vulnerabilities you are listing. Then go on to describe individual vulnerabilities below. >>

- << **Vulnerability #1 (e.g., 'Firewall not consistently present,' 'Funding entirely dependent on public opinion,' 'Building not retrofitted for earthquake protection,' etc.)** >>

<< Add details about this vulnerability, including—if appropriate—how it could be remedied. >>

- << **Vulnerability #2** >>

<< Add details about this vulnerability, including—if appropriate—how it could be remedied. >>

- << **Vulnerability #3** >>

<< Add details about this vulnerability, including—if appropriate—how it could be remedied. >>

## Summary

<< Summarize your discussion of vulnerabilities and ask your reader to take the next step. Be sure to include any important details such as the name of parties to contact for further information or recommendations, any deadlines by which decisions must be made, and so forth. >>



# DANGERS

<< Use this page to describe any dangers you see for your project, your staff, or your organization. These might be physical dangers, such as chemical hazards or site hazards, or political or societal risks of pursuing certain policies or of not taking steps to ward off problems before they occur. For example, if you are digging a drainage ditch, you might need to discuss the hazards of contaminated soil or of working in confined spaces. If you are publishing printed books, you might want to discuss the hazards to your organization of not addressing the growing trend in electronic books. >>

<< Introduce the topic of dangers here, and explain why you feel the need to address the topic in this proposal. Then discuss the individual hazards below. >>

- << **Danger #1 (e.g., "Heavy Commuter Traffic will Continually Pass the Site," "Our Most Dependable Donor Just Died" or "We Have No Contingency Plan to Handle a Business Disruption.")** >>

<< Explain how this danger poses a threat and what you propose to do about it. >>

- << **Danger #2** >>

<< Explain how this danger poses a threat and what you propose to do about it. >>

- << **Danger #3** >>

<< Explain how this danger poses a threat and what you propose to do about it. >>

- << **Danger #4** >>

<< Explain how this danger poses a threat and what you propose to do about it. >>

- << **Danger #5** >>

<< Explain how this danger poses a threat and what you propose to do about it. >>

- << **Danger #6** >>

<< Explain how this danger poses a threat and what you propose to do about it. >>

## Summary

<< Include a summary statement here. You may want reference another page where you detail solutions to the hazards listed above, ask readers for input on how to handle the risks, or restate the need for your organization to take action in a timely manner. >>



# SECURITY CONTROLS

<< Use this template to describe security controls. Security controls can be devices or equipment that limits access to something. A security control can also be a process or procedure that is designed to limit the influence of other processes, such as a control on digital information access. >>

<< Explain the context in which you are discussing security controls, and then proceed to describe the individual security controls below. If describing physical security controls, you may need to include a diagram showing the position and appearance of those controls. >>

- << **Security Control Topic #1 (e.g., "Securing Data Center Access" or "Procedures to Control Access to Confidential Data")** >>

<< Insert here any needed details. You may want a description of the security control device, process, or subject; an explanation how the security control functions; a description of when and how the security control will be used, and so forth. >>

- << **Security Control Topic #2** >>

<< Insert here any needed details. >>

- << **Security Control Topic #3** >>

<< Insert here any needed details. >>

- << **Security Control Topic #4** >>

<< Insert here any needed details. >>

- << **Security Control Topic #5** >>

<< Insert here any needed details. >>

- << **Security Control Topic #6** >>

<< Insert here any needed details. >>

## Summary

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





# EVALUATION

In order to track the effectiveness of the project and to judge the outcome, the following evaluation plan will be used.

<< An evaluation plan should be part of the original proposal; in many cases it may be required. Describe how you will judge the results of the final project to ensure it complies with any contracts, agreements, or other requirements. >>

## **Data Collection**

<< Describe how data will be collected before, during, and after the project has been completed to be used in the final analysis. >>

## **Data Analysis**

<< Describe how the data will be analyzed. >>

## **Evaluation Criteria**

<< Describe the criteria to be met which will be compared to the final analysis. >>

## **Evaluation Reporting**

<< Describe how the results will be reported. >>



# POLICIES

The company policies pertaining to << insert the policies in question >> are outlined below.

<< Outline your company policies as they apply to this proposal. Typically this template is used for government grant proposals where you are required to outline certain policies. Policies could be related to privacy, human resources, personnel, product sales, terms of service, warranties, etc. >>

- **Policy: << Name of the Policy #1 >>**

<< Insert a copy of your company policy here. >>

- **Policy: << Name of the Policy #2 >>**

<< Insert a copy of your company policy here. >>

- **Policy: << Name of the Policy #3 >>**

<< Insert a copy of your company policy here. >>

- **Policy: << Name of the Policy #4 >>**

<< Insert a copy of your company policy here. >>

- **Policy: << Name of the Policy #5 >>**

<< Insert a copy of your company policy here. >>

- **Policy: << Name of the Policy #6 >>**

<< Insert a copy of your company policy here. >>

## Notes

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



## <<Company>>

<<Address1>>

<<Address2>>

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

(PH) <<WorkPhone>>

(FX) <<Fax>>

<<Domain>>

<<SocialMedia1>>

<<SocialMedia2>>

