<<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>>

# PROPOSAL

**<<ProposalTitle>>**

Prepared for:        <<CustFirst>> <<Cu
                     <<CustTitle>>

Prepared by:         <<FirstName>> <<L
                     <<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

# COST SUMMARY

| Products and Services | Qty | Amount |
|---|:---:|:---:|
| << Insert Cost Description >> <br> << Insert Cost Description >> <br> << Insert Cost Description >> | << # >> <br> << # >> <br> << # >> | << $ >> <br> << $ >> <br> << $ >> |
| **Total Costs:** | | **<< $ >>** |
| **Ongoing Yearly Costs** | | |
| << Insert Cost Description >> <br> << Insert Cost Description >> <br> << Insert Cost Description >> | << # >> <br> << # >> <br> << # >> | << $ >> <br> << $ >> <br> << $ >> |
| **Total Ongoing Yearly Costs:** | | **<< $ >>** |
| **Ongoing Monthly Costs** | | |
| << Insert Cost Description >> <br> << Insert Cost Description >> <br> << Insert Cost Description >> | << # >> <br> << # >> <br> << # >> | << $ >> <br> << $ >> <br> << $ >> |
| **Total Ongoing Monthly Costs:** | | **<< $ >>** |
| **Miscellaneous Costs** | | |
| << Insert Cost Description >> <br> << Insert Cost Description >> <br> << Insert Cost Description >> | << # >> <br> << # >> <br> << # >> | << $ >> <br> << $ >> <br> << $ >> |
| **Total Miscellaneous Costs:** | | **<< $ >>** |
| **Subtotal** | | **<< $ >>** |
| **Sales Tax** | | **<< $ >>** |
| **Grand 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.

**TEAMWORK**

<< Use this template to describe how you have worked or plan to work cooperatively with others. This document could be used to explain how teams or individuals within a company will be assigned to work with each other, or to describe how you or your organization will work with other organizations. >>

<< Introduce the topic of teamwork and explain its importance. You may also need to provide a brief description of the project or goals, or explain how the teams or individuals were assigned to the groups you describe below. Headings might be team names or project names. >>

- **<< Teamwork Heading #1 (e.g., "System Security Task Force" or "The Main Street Playground") >>**

  << Describe who is on this team and how they will work or have worked together. For example, you might write "This task force will consist of our three lead programmers and network administrator, who will research security issues and present a plan by September 1." Another example: "Our organization partnered with the Baker Neighborhood Organization and the Citywide Kidzone Committee to fund and build the new playground." >>

- **<< Teamwork Heading #2 >>**

  << Describe who is on this team and how they will work or have worked together. >>

- **<< Teamwork Heading #3 >>**

  << Describe who is on this team and how they will work or have worked together. >>

- **<< Teamwork Heading #4 >>**

  << Describe who is on this team and how they will work or have worked together. >>

- **<< Teamwork Heading #5 >>**

  << Describe who is on this team and how they will work or have worked together. >>

**Summary**

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

# BACKGROUND CHECK

<< Use this page to describe a service to do background checks on prospective employees, clients, or business partners; or to gather information and explain requirements for background checks for employees or renters. Background checks are typically performed to verify that someone has provided truthful information. They are considered especially important for situations where the applicant will have access to large sums of money or will interact with vulnerable people, such as children, the sick, or the elderly. Employers and property owners typically require background checks, but even many charitable organizations require background checks on volunteers who will represent the organization. Background checks for executives or corporations are sometimes referred to as "due diligence." >>

<< Introduce the topic of background checks here. You may want to explain a requirement for background checks, describe how you intend to check information provided by the subject, or explain why verifying a person's history and credentials is so important. You might also want to include explanations of privacy laws and explain rights that a subject has to read resulting reports and correct any misinformation that was included. In addition, you may need to describe what will happen after the background check is complete. >>

<< Insert the steps and schedule for doing background checks here; or insert a form with spaces to gather the information you need for the background check, as well as a statement and signature line where the subject gives you the right to perform a background check. It is also generally wise to provide a legal statement saying that the subject promises not to hold the individuals and organizations performing the background check liable for any incorrect information gathered during the process. >>

# COACHING

<< Use this template to describe any sort of coaching activity. Coaching can apply to any sort of supervised training or teaching activity, from music instruction to sports coaching to career mentoring. For example, a music instructor might use this document to describe how she teaches the piano; a Little League coach might use it to describe baseball lessons for kids, or a company might use it to describe its mentoring approach to new employees. >>

<< Introduce the topic of coaching here and explain why it is important to your organization. >>

## Coach

<< Individual or Team name >>

<< Contact Information – phone, address, email >>

## Coaching Philosophy

<< Insert statement of coaching philosophy here. For example, "You never fail when you try your hardest," or "The decision you make today could affect the rest of your life." >>

## Coaching Activities

<< List activities here, including a schedule if appropriate. For example, a soccer coach might list warm-up exercises and drills and techniques that will be taught, or an academic coach (tutor) might list all the topics to be mastered by the student. >>

## Additional Information

<< Insert additional information here, such as location, hours, and prices for lessons; lists of supplies to bring to lessons; prerequisites that applicants must have or certificates that they will earn, etc. >>
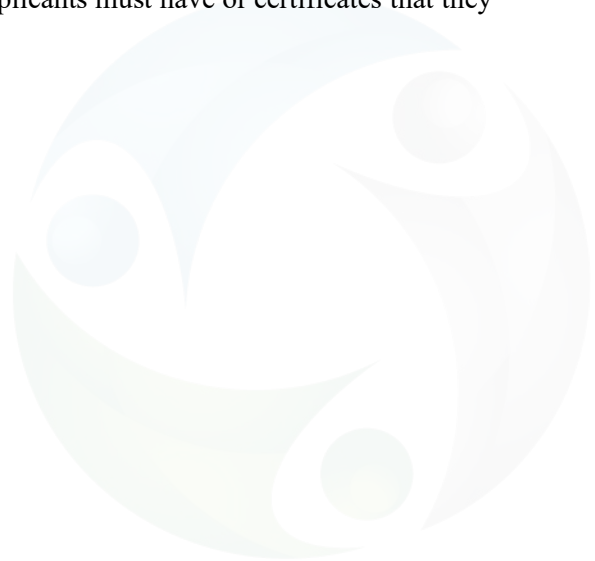
# SCHEDULE OF EVENTS

<< Describe in general the purpose or nature of the events. For example, is registration required? You may need to include exhibitor information, featured speakers, ticket and schedule information, etc. >>

- **<< Event Name #1 >>**

  Date: << Event Date >>

  << Description of the event, featured speakers, exhibitors, etc. >>

  Location: << Event Location >>

  Contact: << Contact Information >>

  Web Site: << URL to Web Site >>

- **<< Event Name #2 >>**

  Date: << Event Date >>

  << Description of the event, featured speakers, exhibitors, etc. >>

  Location: << Event Location >>

  Contact: << Contact Information >>

  Web Site: << URL to Web Site >>

- **<< Event Name #3 >>**

  Date: << Event Date >>

  << Description of the event, featured speakers, exhibitors, etc. >>

  Location: << Event Location >>

  Contact: << Contact Information >>

  Web Site: << URL to Web Site >>

**Notes**

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

# ENROLLMENT

<< Use this page to discuss enrollment in courses or programs. >>

<< Introduce the topic of enrollment here. You might want to state a specific time period, such as "Enrollment Period for Fall Quarter at the Community College will open on August 30th." >>

## Requirements

<< State the requirements for enrolling. These might include restrictions on age, residency, physical abilities, financial situations, test scores, credit scores, and so forth. >>

## Dates

<< State the dates on which you will be accepting enrollment. If enrollment is restricted to a limited number, be sure to state that, too, as well as explaining whether you will maintain a standby list in cases of cancelled enrollments. >>

## Instructions

<< Tell your readers how and where they can enroll. Consider the various possible situations of enrollees, and think about whether you need to provide instructions for returning students or customers, or for those transferring from other programs, or for those with special needs, etc. >>

## Cancellation Policy

<< Describe your policy on when and how enrollment may be cancelled. Be sure to describe any penalties that the enrollee may incur on cancellation. >>

## Other Considerations

<< Use this section to describe costs, schedule interruptions, or any other issues associated with enrollment. >>

## Additional Information

For additional information, << describe how to get additional information here, providing a website URL or phone number >>.

# REQUIREMENTS

The following project requirements will be met to the satisfaction of <<CustCompany>>. The requirements will cover all aspects of the project.

<< Insert the general requirements of the project to be delivered. Examples include, performing to a set of standards, performing to a set of metrics, performing the required functions, system requirements for specific hardware and software needed, all deliverables being met, all contract terms being met, deadlines being met, etc. >>

- **Requirement #1**

    Description: All project deliverables must be delivered and perform to their specifications.

    << Insert summary of all deliverables required. Reference any other templates in the proposal where detailed deliverable information is outlined. >>

- **Requirement #2**

    Description: All contractual obligations must be met as outlined in the contract and addendums.

    << Insert summary of all contractual obligations to be met. Reference any other templates in the proposal where the contractual obligations are outlined. Note that the entire proposal and everything listed in it may be considered part of the contract. >>

- **Requirement #3**

    Description: All required documentation and training must be complete.

    << Insert summary of documentation and training to be completed. Reference the appropriate detained templates such as the Documentation Specs, Training Plan, etc. for more details. >>

- **Requirement #4**

    Description: All system requirements must be met.

    << Insert summary of the system requirements here. System requirements include hardware platforms, configurations, software programs, etc. >>

- **Requirement #5**

    Description: All functional requirements must be met.

    << Insert summary of the functional requirements here. Functional requirements include

all of the major functions the project is to be able to perform when complete.  You can also reference other templates such as the Interface Specs.  >>

- **Requirement #6**

    Description: All performance requirements must be met.

    << Insert summary of the performance requirements here.  Performance requirements include such things as performance metrics, bandwidth, operation speed, maintenance, etc.  >>

## Summary

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

# REFERENCES

The following are some of our clients who have agreed to be references.  Feel free to contact any of our references about their experience with <<Company>>.  For more details see our web site references page at:

<<Insert URL of your references web page>>

- **<< Insert Reference #1 Name >>**

  <<Insert reference company here>>
  <<Insert reference name here>>
  <<Insert reference title here>>
  Phone: <<Insert reference phone here>>
  E-mail: <<Insert reference e-mail here>>

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

  <<Insert reason why you were chosen for the job here>>

- **<< Insert Reference #2 Name >>**

  <<Insert reference company here>>
  <<Insert reference name here>>
  <<Insert reference title here>>
  Phone: <<Insert reference phone here>>
  E-mail: <<Insert reference e-mail here>>

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

  <<Insert reason why you were chosen for the job here>>

- **<< Insert Reference #3 Name >>**

  <<Insert reference company here>>
  <<Insert reference name here>>
  <<Insert reference title here>>
  Phone: <<Insert reference phone here>>
  E-mail: <<Insert reference e-mail here>>

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

  <<Insert reason why you were chosen for the job here>>

# LEADERSHIP

<<Company>> has been a leader in its industry since << insert year >>.

<< Describe how your company has been a leader and how you excel above your competition. Some of the things that distinguish leaders in their field are their ethics, core values, vision and outward look to the community they serve. >>.

## Ethics

<< Describe your company's ethics and how you maintain them. >>

## Core Values

- << Insert core value. >>

  << Insert description of core value here. >>

- << Insert core value. >>

  << Insert description of core value here. >>

- << Insert core value. >>

  << Insert description of core value here. >>

## Vision

We have a vision for our company's long-term future.

<< Describe the long-term visions your company has. These are the goals you are ultimately reaching for. >>

## Charitable Efforts

We understand the importance of giving back to the community. Being a charitable donor to the community helps give us an outward focus and keeps us at the forefront of the community.

<< Insert a statement regarding the charitable efforts of your business. >>

# VOLUNTEERING

<< Use this template to describe volunteer activities you take part in, or to describe volunteer opportunities available for others. >>

<< Introduce the purpose of this document here and explain why volunteering is important to you or your organization. You may want to describe benefits you have gained or that volunteers would gain from participating in these activities. Then list activities below that you participate in or are seeking volunteers for. >>

- **<< Volunteer Title or Activity #1 (e.g., "Food Bank Sorter/Server" or "Collecting Roadside Trash") >>**

  << Add details as needed to fully describe this volunteer activity. You may want to describe the purpose of this activity and then discuss tasks involved, skills needed, schedule, and necessary commitment of time. You might also want to provide a name and contact number of the supervisor. >>

- **<< Volunteer Title or Activity #2 >>**

  << Add details as needed to fully describe this volunteer activity. >>

- **<< Volunteer Title or Activity #3 >>**

  << Add details as needed to fully describe this volunteer activity. >>

- **<< Volunteer Title or Activity #4 >>**

  << Add details as needed to fully describe this volunteer activity. >>

**Summary**

<< Add a summary statement or provide general contact information so volunteers can get more information or sign up for an activity. >>

**<<Company>>**

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

(PH) <<WorkPhone>>
(FX) <<Fax>>
<<Domain>>

<<SocialMedia1>>
<<SocialMedia2>>