



PROPOSAL KIT SAMPLE

Call Center Startup Funding Sample Proposal

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October 19, 20xx

Elliott Rankin
Senior Loan Officer
Downtown Commercial Lenders
1400 Glass Avenue
Wichita, KS 67204

Dear Mr. Rankin,

As you suggested during our preliminary phone call, I am submitting this proposal for your consideration.

Sunter Software has developed a new package for medical offices that comprises recordkeeping, billing, payroll, and so much more. It will revolutionize the industry and bring the ideal of a unified nationwide system of medical records closer to reality.

Our software is currently in the final testing stages, but we already have more than 7,000 advance orders.

Before we ship our product, we need to have a call center in place with 24/7 support for our clients. Sunter Software is now seeking funding to open a call center right here in Wichita.

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 October 26.

Sincerely,

Iliana George
Partner
Sunter Software
620-555-1098
SG@SunterSoftware.com
www.SunterSoftware.com



October 19, 20xx

PROPOSAL

Funding Request to Set Up a Call Center for Sunter Software

Prepared for: Elliott Rankin
Senior Loan Officer

Prepared by: Iliana George
Partner



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EXECUTIVE SUMMARY

Here's a brief summary of this proposal.

The Objective...

Sunter Software seeks \$250,000 in funding to set up a new call center.

- The Sunter Software Medical Office Suite of software products has over 7,000 pre-orders and the software suite will be released soon. Sunter Software needs to have 24/7 customer support available at the time of release.
- Most revenues to Sunter Software will arrive after the new software is deployed, but Sunter Software needs to set up a call center in advance of deployment.

With an established call center, Sunter Software will have all the elements it needs for success in the burgeoning medical software field.

The Solution...

Sunter Software has identified appropriate facilities that are available for lease, and has developed plans for staffing and setting up these facilities.

- Secure \$250,000 funding for call center startup costs.
- Lease and furnish one of the properties listed on the Location Analysis page.
- Staff call center as specified on the Staffing page.

Summary

With an established call center, Sunter Software will have all the elements it needs for success in the burgeoning medical software field.





LOCATION ANALYSIS

Sunter Software has performed a thorough business location analysis for our new call center. Following are the results.

Primary Location

Location: Building 14, Mercer Warehouse Park, Wichita

Security: This building is surrounded by a six-foot chain link fence with a cardkey-controlled gate, which will serve the needs of call center staff and preserve security for the facility. All doors into the facility also have card-key locks installed.

General Building Description: This is a large one-story building with generous restrooms and kitchen, as well as plenty of space for dozens of cubicles and partitioning for offices and meeting rooms as needed. This building was formerly occupied by a telemarketing center, so it needs only minor updating for our needs.

Area Characteristics: This area is occupied by warehousing companies and minor manufacturing businesses. As such, most traffic consists of employees and delivery trucks, and the area is quiet at night. As we plan to operate 24/7, we need a quiet area for employees to come and go, and we don't want to keep neighbors awake with our security lights.

Access: The Mercer Warehouse Park is easily accessible by highway and other roads, and plenty of parking is available for staff within the secure fence.



Alternate Location

Location: 900 West Franklin Blvd, Wichita

Security: This building has standard locks on all doors and no additional security features. The parking lot is bordered by busy streets.

General Building Description: This is a large two-story building with generous restrooms and a small break room, as well as plenty of space for dozens of cubicles and partitioning for offices and meeting rooms as needed. This building was formerly occupied by a small grocery store. It would need to be substantially remodeled to meet our needs.

Area Characteristics: This area is mostly occupied by wholesale companies, convenience stores, and gas stations. Most traffic consists of employees and delivery trucks, and the streets are busy at night, but a call center would not disturb neighbors.

Access: This building is easily accessible by highway and other roads, and plenty of parking is available for staff within the triangular lot.





GROWTH AREAS

The Sunter Software Medical Office Suite is the first of several medical industry packages that will be released by Sunter Software, and all software packages will require customer support via the call center. The three other software packages that are currently in development are:

- **Sunter Software Pharmacy Suite**

This package will consist of recordkeeping applications and billing programs, along with access to an extensive drug and supplement database. This software package is scheduled for release in two years.

- **Sunter Software Hospital Supply Suite**

This is an inventory system that keeps track of supplies, bills them to patient insurance as they are used, and reorders automatically. The software accesses a major medical supply database. This package is scheduled for release in approximately thirty months.

- **Medical Records and Technology Training Package**

This is an online training package that will include basic lessons on best recordkeeping practices and videos on using a wide variety of medical devices. Lessons on new devices and software can be downloaded remotely from the cloud as needed, making this package indefinitely extendable.

Summary

As Sunter Software grows its business by releasing new software products, our call center will need to expand to handle increased demand.



SALES PLAN

Sunter Software has detailed plans on how to grow our market share in coming years.

Strategic Sales Objectives

- Sell the Sunter Software Medical Office Suite to all small to medium medical offices within our state.
- Expand sales of the Sunter Software Medical Office Suite to all small to medium medical offices across the nation.

Methods

- Sell the Sunter Software Medical Office Suite to all small to medium medical offices within our state.

We are already marketing to this audience, and have more than 7,000 pre-orders. Print and internet ads are scheduled after our release date.

- Expand sales of the Sunter Software Medical Office Suite to all small to medium medical offices across the nation.

As many of our in-state medical offices are part of larger national health networks, some of this marketing will occur naturally as local offices adopt our software. Sunter Software has scheduled ads in major print medical journals as well as on appropriate online sites to market across the nation.



Additional Sales Improvements

- After the marketing push for the Sunter Software Medical Office Suite, we will begin marketing for our next three health care software packages, The Sunter Software Pharmacy Suite, The Sunter Software Hospital Supply Suite, and the Medical Records and Technology Training Package.
- Sales of all products will pay for the call center expenses, and the call center will be expanded to handle customer service as each package is rolled out.

Summary

Within a short period of time, Sunter Software will have ample funds to pay back our call center startup loan.





SERVICES PROVIDED

We plan to provide the following services in our call center on a 24/7 basis for our software customers:

- **Calls to support technicians**

Customers can call and chat directly with a customer service technician who can assist them.

- **Online chat**

If customers don't wish to speak directly to our customer support technicians, they can communicate via an online chat service.

- **Email and direct messaging**

When an answer is not immediately needed, customers can send email and text messages that will be answered when technicians are available.

- **ADA-compliant communications**

Deaf and blind customers will be provided access to our customer service services.

- **Remote troubleshooting**

Our technicians will have the capability to access the customer's computer system to analyze and fix problems.





Our call center will require the following positions to begin with. We will expand and restructure as necessary to handle demand in the future.

- **Day Shift Supervisor**

This person will be in charge of the 9 a.m. to 5 p.m. shift, which is expected to experience the highest volume of calls.

- **Six Day Shift Customer Support Technicians**

These technicians will respond to calls from 9 a.m. to 5 p.m.

- **Swing Shift Supervisor**

This person will be in charge of the 5 p.m. to 1 a.m. shift.

- **Five Swing Shift Customer Support Technicians**

These technicians will respond to calls from 5 p.m. to 1 a.m.

- **Night Shift Supervisor**

This person will be in charge of the 1 a.m. to 9 a.m. shift.

- **Three Night Shift Customer Support Technicians**

These technicians will respond to calls from 1 a.m. to 9 a.m.

- **Training Supervisor**

This person will be in charge of training new technicians and updating training as needed. This position will be an on-call subcontractor, not a permanent employee.

Summary

Sunter Software will adjust shift positions as necessary to handle call volume. As we are strategically located in the center of the country, we may also need to adjust our shift start and end times to be most efficient.



EQUIPMENT

Sunter Software plans to purchase and install the following equipment for the call center.

Seven Desktop Computers with Large Screens

We need our staff and supervisors to be comfortable and be able to see multiple windows simultaneously on their screens.

State-of-the-Art Programmable Telephone System

A modern phone system is absolutely key to running a call center. Users must be able to easily make selections when they call, and know exactly how long their wait will be. All technicians will be provided with headsets and microphones.

Furniture

Furniture will need to be provided for six cubicles, one supervisory office, a break room for employees, and a small meeting room.



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