



## **Sales Proposal Outline**

### **Thank You**

- Our client has already spent time with us (at least a few meetings) telling us about their business, a simple thank you goes a long way

### **Executive Summary**

- Create a strong yet concise executive summary
- Show the client we've captured their challenges and priorities
- Who are they as a company and where are they at (current state.)
- Who are we working with on their team, respective roles
- The size of the company and location(s)
- Briefly describe their product / service and why their business idea will be successful
- Finish with the challenges and future plans that brought about our proposal

### **Recommendation**

- Recommend a specific approach or solution that will solve their problem
- Prioritize the goal or outcome they want the most first in our list and work from there
- Include specific deliverables and time-frame.
- Clients like having choices so come up with 2-3 different packages / scenarios starting with the most robust

### **Demonstrate proof points.**

- Quantify the results the client can expect.
- Include some proof points in order of the things that matter the most to the decision maker(s)
- This would also be a good place to include a couple sentence client story or quote

### **Why us?**

- What makes us unique?
- Who we are as a company?
- Why partner with us and why partnering with *us* is the best choice for the client?
- What qualifies us to do the job?

### **Throw in some free added services**

- The experience for the client is just as important as what will be delivered
- We should be generous with our ideas

### **Recap & Next steps**

- Briefly recap who our client is
- Overall recommendation
- Outcomes
- Why they should work with us
- Identify decision timeframe
- What's next?

### **Design & Review**

- Don't overload with text / graphics, keep it simple
- Break out into consumable sections
- Pay close attention to the beginning and end
- Customize the proposal recommendations to clients' needs - avoid boilerplate
- Review before sending it out