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SentryOne Proposal Framework



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# Proposal Summary

June 21, 2018

[Customer full name]

[Customer’s company name]

[Customer address]

Dear [Mr. /Mrs.] [Customer last name],

Thank you for participating in the creation of this proposal and confirming our understanding of your business challenges, project priorities and expected outcomes. Our consultants thoroughly enjoyed working with [Name of the project lead] and his team.

Further to our discussion, I have attached the detailed solution proposal we discussed today for your review and signature.

[Your company’s name], a business applications and information technology firm located at [ADDRESS] (hereinafter also referred to as “[your company’s name]") is pleased to provide this project proposal to [Customer’s company name], a COMPANY located at [Customer address] (hereinafter referred to as “[Customer’s company name]") in support of [Customer’s company name]'s [Name of the project] project (hereinafter referred to as the “Project").

By the signature of [Your company’s name]'s authorized representative hereafter, this Project proposal constitutes [Your company’s name]'s formal offer to provide the services and/or deliverables described herein on the terms and conditions described herein.

This Project proposal will be valid for a period of [NUMBER OF DAYS] days following the date first set forth above.

[Your company’s name]

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

[Your company’s Exec First Name] [Your company’s Exec. Last Name]

[Your company’s name]

# Executive Summary

[Customer’s company name]’s overarching project objective is to [Brief explanation of the project].

[Customer’s company name] estimates that the business challenges that will be addressed by the project are currently costing $xxx in lost revenue and $xxx in unreported billings.

By addressing the business and operational challenges underpinning the project initiative (documented further in this document) [Customer’s company name] believes it can increase revenue by $xxx and reduce unreported billings by $xxx.

Most importantly, the project will provide [Customer’s company name] with [Add any qualitative benefits of the solution here].

[Your company’s name] is a leading provider of IT professional services solutions, and has developed the [Name some software you’ve implemented in the past that are relevant to this project].

# Solution Recommendation

[Brief explanation of the project]

To address the business challenges described above, [Your company’s name] recommends [Customer’s company name] implement [Name the software version].

The primary capabilities that [Customer’s company name] requires are

1. [Name of the feature] – Enables [Customer’s company name] to [Name the specific benefit this feature has for the customer].
2. [Name of the feature] – Enables [Customer’s company name] to [Name the specific benefit this feature has for the customer].
3. [Name of the feature] – Enables [Customer’s company name] to [Name the specific benefit this feature has for the customer].

(Add as many features as needed)

# Project Costs

While there are a number of licensing options available, [Your company’s name] recommends [Customer’s company name] proceed with a **instance-based licensing model** as it provides the greatest degree of flexibility to support [Customer’s company name]’s growth objectives and desire to increase its use of contract consultants.

|  |
| --- |
| Subscription Fees |
| **Proposal Element** | **Server Count** | **Cost/ Month** | **Monthly Cost** |
| Product 1 | n | $xxx | $xxx |
| Product 2 | n | $xxx | $xxx |
| Product 3 | n | $xxx | $xxx |
| **Total** | **N** |  | **$xxx** |

|  |
| --- |
| Professional Services Needed |
| Proposal Component | $xxx |
| Project Management fees | $xxx |
| Other one-time fees | $xxx |
| **Total** | **$xxx** |

# Acceptance

We have reviewed and understand the Terms and Conditions as contained in this proposal dated June 21, 2018.

Deposit due upon acceptance: $xxx.

|  |  |  |
| --- | --- | --- |
| [Customer’s company name] |  | [Your company’s name] |
|  |  |  |
| Name |  | Name |
|  |  |  |
| Signature |  | Signature |
|  |  |  |
| Title |  | Title |
|  |  |  |
| Date |  | Date |