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# Sales Proposal Template

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## Purpose

The purpose of this tool is to help you write a concise sales proposal for prospective customers. Effective proposal demonstrate understanding of needs and a clear solution, pricing and delivery timeframe.

[Insert your Logo here]

Sales Proposal

[Insert date]

Company Name  
Company Address Line 1  
Company Address Line 2

Prepared For:  
Prepared By:  
Date:

Phone Number  
Fax Number  
Website Address

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1. Executive Summary

Briefly outline the challenges your firm can help the prospective organization solve. Provide a concise summary of your solution’s key deliverables, project timelines, pricing, and any other relevant information to influence decision-makers who may only read this part.

2. Our Understanding

2.1 Your Company

Paraphrase prospect’s corporate overview from their website.

2.2 Your Needs

Provide a brief description of the prospect’s needs. Consider using a bulleted list that is prioritized from critical needs to value adds.

Prioritized list of needs:

- Need 1
- Need 2
- Need 3

2.3 Decision Criteria

Decision, including service level agreements, warranties, professional services, delivery timelines, etc.

Key Decision Criteria	Importance (High, Med, Low)
1. Service Level Agreement	High
2. Pricing	Med
3. Available before June 1st	High

3. Our Approach

3.1 Our Company

Provide a concise summary of your organization, including competitive advantages or differentiation from key competitors.

### 3.2 Our Solution

Outline an integrated solution that aligns to the prospect's decision criteria and includes key deliverables, professional services, service level agreement, and project delivery timelines.

#### 3.2.1 Key Product/Service Offering

List the key components of your product/service and relate the features to the prospect's need to demonstrate value.

#### Professional Services

Communicate how you will help with implementation.

#### 3.2.3 Service Level Agreement

Insert your standard service level agreement.

#### 3.2.4 Project Delivery Timelines

Provide a Project Schedule that includes timelines, deliverables, milestones, and checkpoints.

### 3.3 Action Plan

Create a step-by-step Action Plan that illustrates how your solution will be implemented. Align to the prospect's purchasing process.

Step 1 – provide clarity on this step in the process.

Step 2 - provide clarity on this step in the process.

Step 3 – Provide clarity on this step in the process.

Step 4 - provide clarity on this step in the process.

Step 5 - provide clarity on this step in the process.

## 4. Pricing & Terms

### 4.1 Price

Provide pricing details and purchasing options. Be sure to include any additional expenses such as travel for professional services staff.

### 4.2 Terms

State the terms and conditions for the deal.

## 5. Contact Information

### 5.1 Headquarters

Provide the address and contact information for your headquarters.

### 5.2 Account Manager

Provide the contact information for the Account Manager

### 5.3 VP Sales

Provide the contact information for the VP Sales.

## 6. Appendix

### 6.1 Additional Information

Provide any additional information such as a service level agreement, satisfaction guarantee, customer references, testimonials etc.