# Sales proposal template

This sales proposal template is created in a way that allows you to easily add the details about your prospect and your company, products/services and process.

Be sure to add these details in all the **[placeholders]** and follow any of our additional tips and directions marked with an ***asterisk \****.

If any of the sales proposal building blocks don’t work for your specific situation, feel free to remove them. We’ve also added additional sections you can add for the specific needs of real estate and consulting sales proposals.

For more sales proposal tips and inspiration, check out our [sales proposal guide](http://www.pipedrive.com/en/blog/sales-proposal).

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## Sales proposal template

## Title

Sales proposal for **[Prospect’s company name]**

## Sub header

Prepared by **[Your company name]**, **[detail the scope of work for proposed solutions, pricing, key timelines and terms]**.

## About us

**[Your company/product/solution name]** is a **[software/agency/type of company]** committed to **[explain the main challenges you solve]**.

**[Add up to two more sentences about the core work you do]**

**[Add your unique sales proposition *(\*side note: reference some examples in our sales proposal guide)*]**

## Your desired outcomes and challenges

Based on everything we’ve learned about you, we’ve outlined your main goals—desired outcomes—below.

On top of that, thanks to our experience of working with **[dozens, 100+, a similar adequate quantifier]** of customers just like you, we understand the frustrations standing in your way to those outcomes.

1. Your goal is **[insert goal]**, but you face the challenge of **[insert challenge]**
2. Your goal is **[insert goal]**, but you face the challenge of **[insert challenge]**
3. Your goal is **[insert goal]**, but you face the challenge of **[insert challenge]**

(\*side note: use the number of goals that’s appropriate for your prospect, not more and not less!)

## Proposed solution

To help you reach your goal(s), here are our proposed solutions:

* Solution 1: **[product/service name #1]**
* Solution 2: **[product/service name #2]**
* Solution 3: **[product/service name #3]**

*(\*side note: tweak the singular/plural elements of this section based on whether you’re recommending one solution or a few to choose from)*

We’ve specifically developed these products/services to assist companies in **[customer’s industry]** because we know how crucial it is to **[add your solution’s key feature]** in order to overcome your challenges.

## Pricing

In this section, you can find everything you need to know when it comes to our pricing. *(\*side note: we’ve added some examples to get you started.)*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Product/service name** | **Short product/service description** | **Price** | **Quantity (if applicable)** | **Subtotal (if applicable)** |
| Service #1 | E.g. Full website redesign | $8,000 |  |  |
| Service #2 | E.g. Individual page design | $300 | 10 | $3,000 |

Our standard payment schedule is simple and makes it easy to get started *(\*side note: again, we’ve added some examples. Tweak accordingly or simplify if necessary)*:

|  |  |
| --- | --- |
| **Payment date** | **Payment amount** |
| When securing your booking | 30% |
| Project kickoff | 40% |
| Delivery date | 30% |

## Timeline with key dates

The total time of our process is **[X days/weeks]**. Here are the key dates we’re suggesting to get started:

Step 1: **[brief description, length, and start date]**

* E.g. Step 1: Brand interview: getting to understand you, your work, values, teams and USP (1 week, starting April 1st)

Step 2: **[brief description, length, and start date]**

* E.g. Step 2: Competitor research: getting to understand your market and how we can differentiate your message from theirs (1 week, starting April 8th)

Step 3: **[brief description, length, and start date]**...

* E.g. Step 3: Concept presentation: we’ll present you with three design concepts to identify your favorites (1 week, starting April 15th)

*(\*side note: tweak the number of steps and the information included based on your product/service)*

## Case study/studies

**[Name of your customer/client]**

How we **[result, e.g. increased the conversion rate]** by using/implementing **[your solution’s key feature]**

Industry: **[add industry]**

Location: **[add location]**

Results at a glance:

* **[list percentages and other stats that immediately showcase results]**

The challenge: **[describe the challenge in a few words]**

**[One or two short paragraphs about the challenge your customer/client had before you helped them]**

The solution: **[describe the solution in a few words]**

**[One or two short paragraphs about the solution and the results you achieved as the outcome]**

**Read the whole story here: [link to the case study]**

## Client testimonials

The feedback from our customers/clients is what matters the most to us. It’s how we can keep getting better at what we do for you. Here’s what some of them had to say.

**[Insert a few testimonials, each about two sentences long. After each testimonial, add the name and title of your customer/client.]**

## Terms

**[Include the terms, conditions and guarantees of your product or service if they’re brief, or link to an agreement in case it’s longer.]**

## Next steps

Ready to get started? It’s easy:

1. Select your preferred solution *(\*side note: remove if you’re only suggesting one solution)*
2. Enter your first and last name
3. Enter your signature
4. Enter today’s date

We’re so excited to work with you! If you have any questions prior to accepting this proposal, don’t hesitate to contact us on **[email and/or phone number]**.

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# Additional sections for real estate sales proposal

**Property price**

*(\*side note: replace the Pricing section with this one)*

Total purchase price:

Refundable deposit:

Non-refundable deposit:

**Conditions**

Closing date:

Contingencies:

**Additional costs to keep in mind**

Remember to account for these costs we’ve discussed *(\*side note: add/remove as appropriate)*:

* Escrow and closing fees
* Attorney’s fees
* Costs of recording the deeds
* Current year’s prorated taxes

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## Additional sections for consulting sales proposal

## Approach and methodology

**[Write two to three paragraphs on the industry practices and methodologies you’ll implement during this consulting engagement. You can also list the formats and deliverables of the engagement, such as video calls, templates, checklists, documents, worksheets and so on.]**

## Project roles

**[Use this section to list the key people involved in this project on your side. Include details such as names, key responsibilities and experience each person brings to the table.]**

For example:

During the four weeks of our process, you’ll get to meet and work with:

* [Name], our head of brand: She oversees the development and execution of all brand communication. She works with you and our designers to ensure your brand story is reflected accurately and consistently.
* [Name], our web designer: He creates the look, features, and all layouts of your website. Thanks to his extensive experience, he makes the most out of all the copy, images and video you provide.

**[If applicable, you can also add the requirements your client’s team needs to fill. For example, you may need a dedicated person for communication, a project manager and so on.]**

For example:

For our team to deliver the best results possible, we’ll need access to your:

* Copywriter: This ensures we can tailor the layouts to your web copy instead of forcing your copy to adapt to a layout that doesn’t necessarily work.
* Project manager: We simply need to know who is our main point of contact during this process so that we can maximize everyone’s input and avoid redundant meetings, emails and so on.