**Template sales proposal**

The template sales proposal can be used to help you structure your sales pitch to potential clients. It includes a cover letter, company presentation, solutions proposal, quote and template client testimonial. Modify it as necessary to reflect your company’s circumstances, industry and solutions or products.

[Date]

[Client’s name]

[Client’s company]

[Client’s address]

Dear [Client’s name],

Thank you for accepting this proposal from [your company] to provide [your product/service] to [client’s company].

We understand you need [describe the outcome the client’s company is looking to achieve]. As you’ll see in the attached material, we have the [experience/process/tools/team] to help you achieve your goals and [solve a specific problem].

Specifically, we bring [describe your unique value proposition and the element of your solution that makes you the best choice]. These capabilities will allow us to provide you with [describe the benefits/results the client’s company will receive].

Please do not hesitate to contact me at [phone number and/or email address] if you have any questions about our company or services.

Sincerely,

[Your signature]

[Your name]

[Your title]

[Additional contact information]

**logo here**

[Your logo]

**Sales proposal template**

For [client company]

[Name of the project]

[date]

**Prepared by:**

[your name, title, company]

[Your address]

[your phone number]

[your email]

**1. Executive summary**

Explain what problem you want to help your client solve. Provide a precise summary of your solution and the key deliverables included in your proposal. Also include:

* project timelines
* pricing
* other relevant information for decision-makers

**2. Company description**

Describe your company in two to three sentences.

**3. Team members**

Introduce the members of your team who will be supporting your client.

|  |  |
| --- | --- |
| [Insert employee picture]  Image result for profile image | [Name]   * Relevant career highlight 1 * Relevant career highlight 2 * Relevant career highlight 3 |
| [Insert employee picture]  Image result for profile image | [Name]   * Relevant career highlight 1 * Relevant career highlight 2 * Relevant career highlight 3 |
| [Insert employee picture]  Image result for profile image | [Name]   * Relevant career highlight 1 * Relevant career highlight 2 * Relevant career highlight 3 |

**4. Client pain points**

Describe in detail the clients goals and objectives and the challenges they are facing.

**5. Our solution**

How will your solution solve their challenge? Explain the scope of the proposed project.

Explain the deliverable and the execution of the project.

**Deliverables**

* Element 1
* Element 2
* Element 3

**6. Timeline**

Propose a step-by-step action plan to explain how and when your solution or product will be delivered to the client.

|  |  |
| --- | --- |
| **Step 1**  [details of the deliverable] | Delivery date |
| **Step 2**  [details of the deliverable] | Delivery date |
| **Step 3**  [details of the deliverable] | Delivery date |
| **Step 4**  [details of the deliverable] | Delivery date |

**7. Key outcome measures**

The success of this proposal rests on the following [x] measures that will be tracked as follows:

1. Metric [explain the metric]
2. Metric [explain the metric]
3. Metric [explain the metric]
4. Metric [explain the metric]

|  |
| --- |
| **Quote**  **Element 1**  First task in element 1 [$000.00]  Second task in element 1 [$000.00]  Third task in element 1 [$000.00]  **Element 2**  First task in element 2 [$000.00]  Second task in element 2 [$000.00]  Third task in element 2 [$000.00]  **Element 3**  First task in element 3 [$000.00]  Second task in element 3 [$000.00]  Third task in element 3 [$000.00] |
| **Subtotal** [$000.00]  **Sales tax[[1]](#footnote-1)**  [$000.00]  **Total**  [$000.00] |

**Terms**

Financial and legal conditions to the proposal

**Warranty**

Your warranty policy

**Confidentiality**

Assurances of your commitment to keeping client information confidential

**Contact information**

Provide the contact information of the account manager as well as of a collegue in case he or she can’t be reached.

**Annex 1: Client testimonial**

**Name of the client**

**Name of the company (for B2B businesses)**

|  |  |
| --- | --- |
| **Company profile** (for B2B businesses)  Describe the client’s business. You can often take language from their website or documentation. | **Insert client picture**  Image result for profile image |
| **Problem**  Describe the problem your client was trying to resolve. |
| **Solution**  Explain how you helped the client. | **“Insert a quote in which the client explains what results the client was able to obtain after doing business with your company. ”** |
| **Results**  Give concrete examples of the results you achieved. Results backed by numbers are the most impactul (i.e., profits increased by 5% year over year). |

### Terms and conditions for using BDC’s sales proposal template

### You are permitted to use this template solely for your company's business activities.

### You may not mention BDC's name in a sales proposal to your clients and you are responsible for the content included in the sales proposal.

### We cannot guarantee that the use of this template will increase your sales and we will not be held liable for any damages arising from its use.

### If you do not agree with the foregoing, do not use the template.

1. Sales taxes vary from province to province. As of June 2018, they were set at:

   HST [15% in N.B., N.L., N.S., and P.E.I.; 13% in Ont.]

   Que. GST (5%) + QST (9.975%)

   Man. GST (5%) + PST (8%)

   Sask. GST (5%) + PST (6%)

   Alta. GST (5%)

   in B.C. GST (5%) + PST (7% [with exceptions](https://www2.gov.bc.ca/gov/content/taxes/sales-taxes/pst)) [↑](#footnote-ref-1)