OLSON HARRIS LTD.

Proposal for Services

For Independent Contractors

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| --- | --- |
| Raised hand with solid fill | The proposal for services is at the heart of an independent contractor’s sales tool kit. It combines key company information, your unique selling proposition, and your knowledge of a client’s needs and wants into a single document that can also serve as a basis for contract negotiations.  Use this sample proposal as an outline for developing your own.  To delete any shaded tips (like this one), just select the tip text and then press the spacebar.  The sample content throughout this proposal includes placeholder content for you to replace with your own. |

# Overview

|  |  |
| --- | --- |
| Raised hand with solid fill | Use the overview to provide a brief summary of the reason for the proposal, and how you can best support the client’s needs. You can expand on this summary throughout the rest of the proposal. |

OLSON HARRIS LTD. is pleased to submit this proposal for services to support Northwind Traders in achieving its goals for improving customer satisfaction by providing training and post-sales support for its new order entry and fulfillment system. We have partnered with dozens of small businesses throughout the Northeast—businesses committed to improving the customer experience through convenience, accuracy of orders, and timely delivery.

## The Objective

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| --- | --- |
| Raised hand with solid fill | Include a purpose statement that covers the problem and the key theme around your solution. Restate the client’s needs as determined by reading their RFP or your previous interview process. |

* Need #1: Improve response time for customer questions
* Need #2: Improve upon weaknesses in upsell/cross-sell volumes
* Need #3: Rapid training for staff on new system

## The Opportunity

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| --- | --- |
| Raised hand with solid fill | Include major points and identify the opportunity. Restate the client’s project goals you identified previously (such as via RFP, interview, etc.). |

* Goal #1: Train all CSRs on new system within 6 weeks of go-live date
* Goal #2: Integrate sales training with functional training on new system
* Goal #3: Monitor sales volume, return rates, and key satisfaction metrics for 6 weeks following training

## The Solution

|  |  |
| --- | --- |
| Raised hand with solid fill | Include recommendations that lead to your proposed solution. Summarize what you’re proposing to do and how you’re going to meet the goals. You’ll be able to expand on the details within the ‘Our Proposal’ section. |

* Recommendation #1: Stay ahead of customer trends
* Recommendation #2: Implement logistics solution
* Recommendation #3: Focus on order management and automation

# Our Proposal

|  |  |
| --- | --- |
| Raised hand with solid fill | Provide background information, including a brief background on your company and your understanding of the client’s needs and specific issues to be addressed. You may also choose to include the results of any related research, project history, and additional factors that impact the client’s needs, such as socio-economic trends or impending regulations.  Show your understanding of the benefits the client can expect. For example, describe the risks--what might be lost--if appropriate action is not taken and compare this to the benefits they can achieve with a positive course of action. If applicable, identify potential areas of concern for the client and how you can address them. Such items may be fundamental issues that appear trivial, but are often overlooked by competing proposals.  Describe how your capabilities and proposed solution align with the client’s goals for the project, including how your qualifications can uniquely address the current opportunity. |

Northwind Traders has a well-deserved reputation for quality customer service. However, faced with changes in distribution systems, economic impacts to transportation and logistics, and limitations that prevent taking full advantage of improvements in technology, Northwind Traders faces the possibility of decreasing sales revenues due to customer perceptions of slow delivery and services.

## Rationale

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| --- | --- |
| Raised hand with solid fill | Describe your reasons for developing the project as you have proposed it. You may need to justify why you have chosen your unique approach. Consider including the following points in your rationale. |

* Research
* Market opportunities
* Alignment with mission
* Current resources/technology

## Execution Strategy

Our execution strategy incorporates proven methodologies, extremely qualified personnel, and a highly responsive approach to managing deliverables. Following is a description of our project methods, including how the project will be developed, a proposed timeline of events, and reasons for why we suggest developing the project as described.

|  |  |
| --- | --- |
| Raised hand with solid fill | Summarize your strategy based on your research into the client’s needs, your experience in providing similar services to other clients, etc. |

## Technical/Project Approach

|  |  |
| --- | --- |
| Raised hand with solid fill | Describe the details of how the project will be managed from start to finish. This will include your specific methodologies for completing deliverables, project management tools and techniques, communications with the client, methods to evaluate and mitigate risk, and how the project will be evaluated. |

## Resources

|  |  |
| --- | --- |
| Raised hand with solid fill | Describe the resources you have in place or plan to acquire, such as qualified contractors, facilities, and technology. |

## Project Deliverables

Following is a complete list of all project deliverables:

|  |  |
| --- | --- |
| Deliverable | Description |
| IT support solution | Solutions to improve customer relations |
|  |  |
|  |  |

## Timeline for Execution

|  |  |
| --- | --- |
| Raised hand with solid fill | Summarize the timeline of project-related events from start to finish. |

Key project dates are outlined below. Dates are best-guess estimates and are subject to change until a contract is executed.

|  |  |
| --- | --- |
| Raised hand with solid fill | In the table that follows, include all important dates related to the project, broken down by date and duration. The descriptions shown are for illustration purposes only: replace them with meaningful descriptions related to your project. Items can include such things as payment and project milestones, installation schedules, meetings, or reviews. |

|  |  |  |  |
| --- | --- | --- | --- |
| Description | Start Date | End Date | Duration |
| Project Start | 1/9/23 | 4/1/23 | 3 months |
| Milestone 1 |  |  |  |
| Milestone 2 |  |  |  |
| Phase 1 Complete | 2/1/23 |  |  |
| Milestone 3 |  |  |  |
| Milestone 4 |  |  |  |
| Phase 2 Complete | 3/1/23 |  |  |
| Milestone 5 |  |  |  |

## Supplied Material

The following materials are to be supplied by Northwind Traders for this project. For OLSON HARRIS LTD. to meet project milestones, this material must be supplied on schedule. The due dates included in the following table represent our best guess based on current proposed project dates:

|  |  |
| --- | --- |
| Materials to be supplied by Northwind Traders | Due Date\* |
| User data | 12/31/22 |
|  |  |
|  |  |

\*We cannot be responsible for cost overruns caused by client’s failure to deliver materials by agreed-upon due dates.

# Expected Results

|  |  |
| --- | --- |
| Raised hand with solid fill | Describe the results expected from the project and why your approach will achieve those results. |

We expect our proposed solution to Northwind Traders ’s requirements to provide the following results:

## Financial Benefits

* Result #1: Boost engagement
* Result #2: Grow sales
* Result #3: Retain customers

## Technical Benefits

* Result #1: Larger demographic
* Result #2: Platform diversification
* Result #3: Ease of access

## Other Benefits

|  |  |
| --- | --- |
| Raised hand with solid fill | Use this section to describe less tangible benefits such as increased morale or improved customer satisfaction. |

# Pricing

The following table details the pricing for delivery of the services outlined in this proposal. This pricing is valid for ## days from the date of this proposal:

|  |  |
| --- | --- |
| Services Cost Category #1 | Price |
| Consultation services | $500.00 |
|  |  |
|  |  |
| Total Services **Category #1** Costs | $12,000 |
| **Services Cost Category #2** |  |
| Facilities |  |
|  |  |
| License Fees |  |
| Equipment Rental |  |
| Training |  |
| Travel |  |
| Marketing |  |
| Shipping/Handling |  |
| Total Services **Category #2** Costs | $6,000 |
| **Services Cost Category #3** | **$500** |
|  |  |
| Total Services **Category #3** Costs | $500 |
| **Total** | **$19,000** |

Sample Disclaimer: Disclaimer: The prices listed in the preceding table are an estimate for the services discussed. This summary is not a warranty of final price. Estimates are subject to change if project specifications are changed or costs for outsourced services change before a contract is executed.

# Qualifications

OLSON HARRIS LTD. is continually proven to be an industry leader for high quality/guaranteed product/service in the following ways:

|  |  |
| --- | --- |
| Raised hand with solid fill | Describe what sets your company apart from your competition (your unique selling proposition). |

* Vision
* Inspiration
* Flexibility

|  |  |
| --- | --- |
| Raised hand with solid fill | Describe the strengths of your company, focusing on specializations that are most relevant for this project. As appropriate, include additional strengths of your unique selling proposition that provide benefits the customer may not have articulated.  Identify qualifications that support your ability to address specific client needs for the project.  Provide information that shows how you can meet the required schedule, such as staffing/subcontractors and percentage of time devoted to the project. |

# Conclusion

|  |  |
| --- | --- |
| Raised hand with solid fill | Close out the proposal with a statement that demonstrates your concern for the client and their needs, your expertise, and your willingness to help them solve the issues in question. Include any expected next steps and note the ways they can get in touch with you. |

We look forward to working with Northwind Traders and supporting your efforts to improve your sales cycle with integrated CRM, JIT Inventory management, and training and support services. We are confident that we can meet the challenges ahead, and stand ready to partner with you in delivering an effective IT support solution.

If you have questions on this proposal, feel free to contact Michelle at your convenience by email at olson@example.com or by phone at (123) 456-7890. We will be in touch with you next week to arrange a follow-up conversation on the proposal.

Thank you for your consideration,

Michelle Wattz   
VP of Sales & Marketing