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# **COVER PAGE**

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## **Confidentiality Statement**

You’ve put a lot of work into your proposal, so why not ask your prospect to keep it confidential? You don’t need to include this document, though, so don’t feel obligated to include it in every proposal you create.

## **Introduction**

Introduction to your company, what it is you do, and what differentiates you from your competition. Think of this like a boilerplate that you can use in your current, and future, proposals.

## **Team**

To make your proposal more human, include a section about your team — the people you have hand-chosen to solve your potential client’s problem. Use photos and credentials to solidify why they are a perfect fit for this project, as well as the roles they’ll be playing and tasks they’ll be tackling throughout the process.

**Pro tip**: Make sure to make little changes depending on the project you’re bidding on to drive home the point that your business is the best business for the job.

## **The Problem**

What problem is your potential client looking to solve? If they haven’t been upfront about this problem, it’s up to you to define one. Keep it clear and concise, but expand on why the problem is, well, a problem. Make sure to let your prospect know you’ll be going into more detail in your solution.

**Pro tip**: Always take an optimistic tone for your problem statement — no one likes to be told they’re wrong, or have been doing something wrong for a long time.

## **The Solution**

How will you address your potential client’s pain point? What tactics and strategies will you employ to help solve your potential client’s problem? What benefit will your solution give to your client?

Address each bullet point outlined in your problem section and provide a compelling solution statement to each. “Need a new website because their current website is outdated” isn’t an appropriate solution statement, you need to give your potential client a compelling reason as to why they’ll need your proposed solution.

**Pro tip**: Include any mockups, prototypes, or creative concepts you developed in the pre-pitch phase to showcase that you’re already thinking about solving their needs.

## **Case Studies**

Have you done similar solutions for your existing clients? Add these case studies to your proposal to add more weight to your solutions. In this section, you’ll include results, visual assets, and other compelling data to validate your ideas.

**Pro tip**: If you have testimonials from past clients for similar work, make sure to leverage them here.

## **Project Overview**

Think of this like an introduction to the project — an executive summary for what it is you’ll provide your potential client, how you’ll provide it, and how much it will cost in total;. A TL;DR for the second half of your proposal.

**Pro tip**: Save the charts, visual timelines, and beautiful graphics for the Scope of Work section of your proposal. Keep this area concise.

## **Goals and Objectives**

If you have some existing numbers to go by, make sure to include some objectives before going into the logistics of your project. However, if you don’t have quantitative metrics, feel free to use some compelling, well-thought out qualitative goals and objectives.

**Pro tip**: Make sure your objectives are SMART — Specific, Measurable, Attainable, Realistic, and Time-based.

## **Deliverables, Timeline, and Pricing (Scope of Work)**

**A realistic timeline of your deliverables, complete with a short description of the task and a comprehensive breakdown of costs. Make sure to include a copy of your quote/estimate in this section, as well as a detailed timeline (preferably in the form of a comprehensive table).**

**Pro tip**: Make this section shine by adding spot colours, clean lines, and simple charts.

## **Conditions**

A TL;DR of important conditions outlined in the contract. Things you want your potential client to know about working with you, about the project, or about the scope of work.

Pro tip: Make sure you have a lawyer review your condition statements to make sure they make sense and embody all the terms you wish to relay to your potential client.

## **Next Steps and CTA**

What needs to be done for the project to move forward? Include a CTA to get in touch for more information, or to sign the contract (which you’ve conveniently attached).

**Pro tip**: Always include a contract. Though a prospective client may reach out for more information before they sign it, they can at least have their legal team (or counsel) review while you’re answering their questions. This saves time in the long run!

## **Contract**

Make it easy for your potential client to become your actual client by allowing them to sign-on-the-dot should they approve of everything in your proposal.