next8n

PROPOSAL TEMPLATE

Workflow Automation Delivery Framework

ENTERPRISE EDITION

Version: 2.0

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Proposal Template

Workflow Automation Solutions

```
+==========================================================================+
|                                                                          |
|                        P R O P O S A L                                   |
|                                                                          |
|                  Workflow Automation Solutions                           |
|                                                                          |
+==========================================================================+
|                                                                          |
|   Prepared For:     [CLIENT COMPANY NAME]                                |
|   Prepared By:      [YOUR COMPANY NAME]                                  |
|   Date:             [DATE]                                               |
|   Valid Until:      [DATE + 30 DAYS]                                     |
|   Proposal #:       [PROPOSAL-XXXX]                                      |
|                                                                          |
+==========================================================================+
```

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1. Executive Summary

```
+------------------------------------------------------------------------+
|                          EXECUTIVE SUMMARY                             |
+------------------------------------------------------------------------+
```

Dear [CLIENT CONTACT NAME],

Thank you for the opportunity to present this proposal for [PROJECT NAME/TYPE]. After our conversation on [DATE], we understand that [CLIENT COMPANY] is looking to [HIGH-LEVEL GOAL - e.g., "automate key business processes to increase efficiency and reduce manual workload"].

The Challenge:
[1-2 sentences summarizing the core problem you're solving]

Our Solution:
[1-2 sentences describing your proposed approach]

Expected Outcomes:
- [Key benefit 1 - e.g., "Save 20+ hours per week on manual data entry"]
- [Key benefit 2 - e.g., "Reduce response time to customers by 80%"]
- [Key benefit 3 - e.g., "Eliminate human error in order processing"]
- [Key benefit 4 - e.g., "Enable 24/7 automated operations"]

Investment: Starting at $[X,XXX] | **Timeline:** [X] weeks

We're confident this solution will deliver significant value to your organization and look forward to partnering with you.

2. Understanding Your Situation

```
+-----------------------------------------------------------------------------+
|                           YOUR CURRENT SITUATION                            |
+-----------------------------------------------------------------------------+
```

2.1 About [CLIENT COMPANY]

[2-3 sentences about the client's business, industry, and what they do. Show that you understand their business.]

2.2 Current Challenges

Based on our discussions, we understand you're facing the following challenges:

CHALLENGE	IMPACT
[Challenge 1]	[Business impact - time, money, frustration]
[Challenge 2]	[Business impact]
[Challenge 3]	[Business impact]
[Challenge 4]	[Business impact]

2.3 The Cost of the Current Situation

```
+--------------------------------------------------------------+
|  Current Manual Process Costs (Estimated)                    |
+--------------------------------------------------------------+
|                                                              |
|  Hours spent weekly on manual tasks:      [XX] hours         |
|  Hourly cost of staff time:               $[XX]/hour         |
|  Weekly cost:                             $[X,XXX]           |
|  Annual cost:                             $[XX,XXX]          |
|                                                              |
|  Additional costs:                                           |
|  - Errors and rework:                     $[X,XXX]/year      |
|  - Delayed responses/lost opportunities:  $[X,XXX]/year      |
|  - Staff frustration and turnover:        Incalculable       |
|                                                              |
+--------------------------------------------------------------+
```

2.4 Your Goals

You've shared that your primary objectives are:

1. **[Goal 1]** - [Brief description]

2. **[Goal 2]** - [Brief description]

3. **[Goal 3]** - [Brief description]

3. Proposed Solution

```
+----------------------------------------------------------------+
|                    PROPOSED SOLUTION                           |
+----------------------------------------------------------------+
```

3.1 Solution Overview

We propose implementing [NUMBER] automated workflows using n8n workflow automation, integrated with your existing tools including [TOOL 1], [TOOL 2], and [TOOL 3]. This solution will [MAIN OUTCOME].

3.2 Workflow Descriptions

Workflow 1: [WORKFLOW NAME]

```
+-------------------------------------------------------------+
|   [WORKFLOW NAME]                                           |
+-------------------------------------------------------------+
|                                                             |
|  TRIGGER                                                    |
|     +-- [How the workflow starts]                           |
|                                                             |
|  PROCESS                                                    |
|     +-- [Step 1: What happens first]                        |
|     +-- [Step 2: Next step]                                 |
|     +-- [Step 3: AI/processing step if applicable]          |
|                                                             |
|  OUTPUT                                                     |
|     +-- [What the workflow produces/does]                   |
|                                                             |
|  BENEFIT: [Specific benefit - e.g., "Saves 5 hours/week"]   |
|                                                             |
+-------------------------------------------------------------+
```

Purpose: [Detailed description of what this workflow accomplishes]

Integrations: [List of tools/systems connected]

Workflow 2: [WORKFLOW NAME]

```
+----------------------------------------------------------------+
|   [WORKFLOW NAME]                                              |
+----------------------------------------------------------------+
|                                                                |
|  TRIGGER                                                       |
|     +-- [How the workflow starts]                             |
|                                                                |
|  PROCESS                                                       |
|     +-- [Step 1]                                              |
|     +-- [Step 2]                                              |
|     +-- [Step 3]                                              |
|                                                                |
|  OUTPUT                                                        |
|     +-- [What the workflow produces/does]                     |
|                                                                |
|  BENEFIT: [Specific benefit]                                  |
|                                                                |
+----------------------------------------------------------------+
```

Purpose: [Detailed description]

Integrations: [List of tools/systems connected]

Workflow 3: [WORKFLOW NAME]

```
+----------------------------------------------------------+
|  [WORKFLOW NAME]                                         |
+----------------------------------------------------------+
|                                                          |
|  TRIGGER                                                 |
|    +-- [How the workflow starts]                         |
|                                                          |
|  PROCESS                                                 |
|    +-- [Step 1]                                          |
|    +-- [Step 2]                                          |
|    +-- [Step 3]                                          |
|                                                          |
|  OUTPUT                                                  |
|    +-- [What the workflow produces/does]                 |
|                                                          |
|  BENEFIT: [Specific benefit]                             |
|                                                          |
+----------------------------------------------------------+
```

Purpose: [Detailed description]

Integrations: [List of tools/systems connected]

3.3 Technology Stack

COMPONENT	TECHNOLOGY	PURPOSE
Automation Platform	n8n	Core workflow automation engine
Automation Engine	[Custom/Third-party]	[Intelligent processing, content generation, etc.]
[Integration 1]	[Tool Name]	[Purpose]
[Integration 2]	[Tool Name]	[Purpose]
[Integration 3]	[Tool Name]	[Purpose]

4. Deliverables

```
+--------------------------------------------------------------------------+
|                              DELIVERABLES                                |
+--------------------------------------------------------------------------+
```

4.1 Complete Deliverables List

#	DELIVERABLE	DESCRIPTION	INCLUDED
1	**Workflow 1: [Name]**	[Brief description]	
2	**Workflow 2: [Name]**	[Brief description]	
3	**Workflow 3: [Name]**	[Brief description]	
4	**Integration Setup**	Connection to all required systems	
5	**Testing & QA**	Comprehensive testing with real data	
6	**Documentation**	Complete workflow documentation	
7	**Video Walkthrough**	Loom video explaining each workflow	
8	**Training Session**	[X]-minute handover call	
9	**Workflow Backups**	JSON exports of all workflows	
10	**Post-Launch Support**	[X] days of support after go-live	

4.2 Documentation Package

You will receive:

- [ ] Technical documentation for each workflow

- [ ] Credential setup guide

- [ ] Troubleshooting FAQ

- [ ] Workflow diagram/visual maps

- [ ] Video walkthrough (Loom recording)

- [ ] JSON backup files

4.3 What's NOT Included

For clarity, the following are outside the scope of this proposal:

- [Exclusion 1 - e.g., "Custom dashboard development"]

- [Exclusion 2 - e.g., "Integration with systems not listed"]

- [Exclusion 3 - e.g., "Ongoing maintenance (quoted separately)"]

- [Exclusion 4 - e.g., "Data migration from legacy systems"]

Additional work can be quoted separately upon request.

5. Project Timeline

```
+--------------------------------------------------------------------+
|                          PROJECT TIMELINE                          |
+--------------------------------------------------------------------+
```

5.1 Timeline Overview

Estimated Duration: [X] weeks from project start

```
+------------------------------------------------------------------+
|                                                                  |
|  WEEK 1          WEEK 2          WEEK 3          WEEK 4          WEEK 5     |
|  -------         -------         -------         -------         -------   |
|                                                                  |
|  +---------+     +-------------------------+                     |
|  | KICKOFF |     |    DEVELOPMENT          |                     |
|  | & SETUP |     |    Build workflows      |                     |
|  +---------+     +-------------------------+                     |
|                                                                  |
|                         +----------------------+                 |
|                         | TESTING & REFINEMENT |                 |
|                         | QA and adjustments   |                 |
|                         +----------------------+                 |
|                                                                  |
|                                   +----------------------+ |
|                                   | DELIVERY & HANDOVER   | |
|                                   | Docs, training, go-live| |
|                                   +----------------------+ |
|                                                                  |
|                                                                  |
+------------------------------------------------------------------+
```
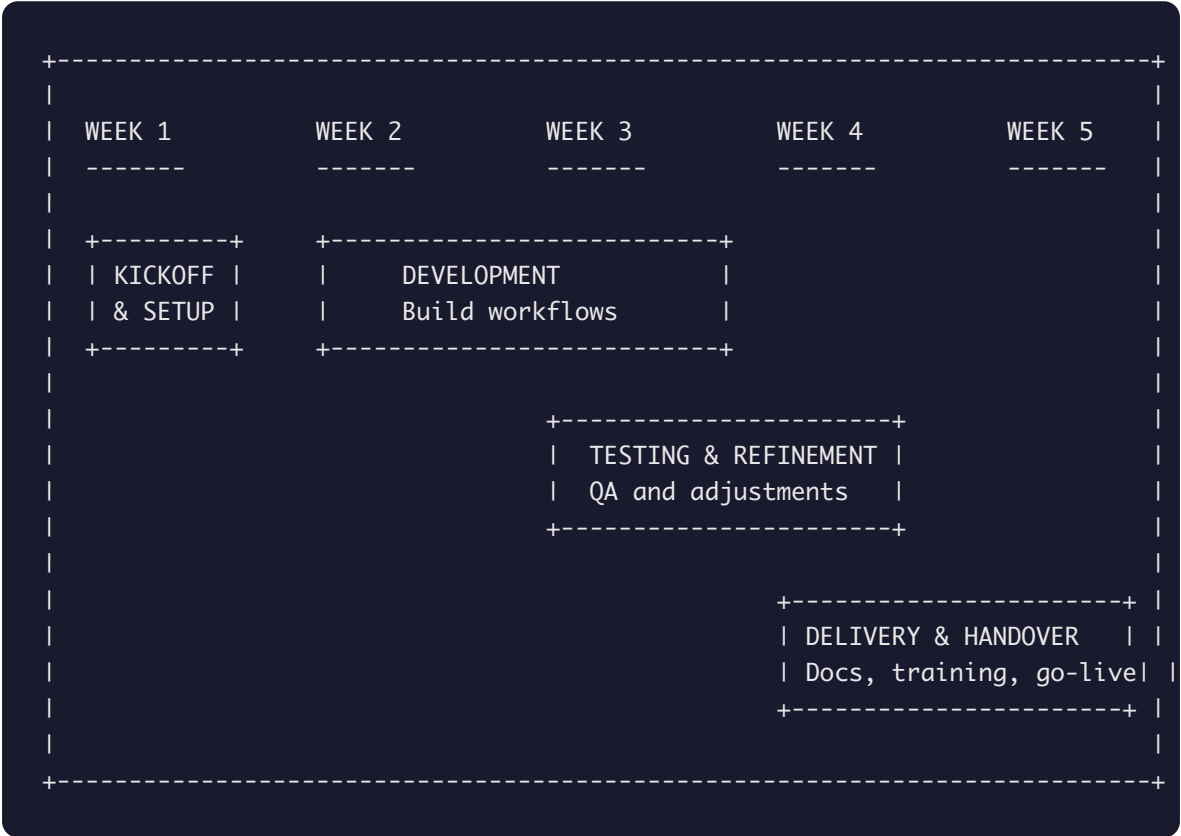
5.2 Phase Breakdown

PHASE	DURATION	ACTIVITIES	YOUR INVOLVEMENT
1. Kickoff & Setup	[X days]	Project kickoff call, environment setup, credential configuration	Provide access & attend call
2. Development	[X weeks]	Build all workflows, configure integrations, implement AI components	Available for questions
3. Testing	[X days]	Internal QA, your review, refinements based on feedback	Test and provide feedback
4. Delivery	[X days]	Documentation, training session, go-live	Attend handover call

5.3 Key Milestones

MILESTONE	TARGET DATE	DELIVERABLE
Project Kickoff	[Week 1]	Kickoff call completed, access confirmed
First Workflow Demo	[Week 2]	Review of initial workflow
Development Complete	[Week 3]	All workflows built and ready for testing
Client Testing Sign-off	[Week 4]	Approval to proceed to delivery
Go-Live & Handover	[Week 5]	All deliverables complete, training done

5.4 What We Need From You

To meet this timeline, we'll need:

REQUIREMENT	WHEN NEEDED	WHY
Access credentials	Before kickoff	To set up integrations
Sample data	By kickoff	For testing workflows
Feedback on demos	Within 48 hours	To keep on schedule
Availability for calls	As scheduled	Decision-making

Note: Delays in providing requirements may extend the timeline proportionally.

6. Investment Options

```
+--------------------------------------------------------------+
|                      INVESTMENT OPTIONS                      |
+--------------------------------------------------------------+
```

6.1 Package Options

Choose the package that best fits your needs:

```
+------------------+------------------+------------------+
|     STARTER      |     STANDARD     |     PREMIUM      |
|                  |   * RECOMMENDED  |                  |
+------------------+------------------+------------------+
|                  |                  |                  |
|    $[X,XXX]      |    $[X,XXX]      |    $[X,XXX]      |
|                  |                  |                  |
+------------------+------------------+------------------+
|                  |                  |                  |
| [X] Workflows    | [X] Workflows    | [X] Workflows    |
|                  |                  |                  |
| Basic integrations | Full integrations | Full integrations |
|                  |                  |                  |
| Documentation    | Documentation    | Documentation    |
|                  | + Video walkthrough| + Video walkthrough|
|                  |                  |                  |
| Email support    | Training call    | Extended training |
|                  |                  |                  |
| [X] days support | [X] days support | [X] days support |
|                  |                  |                  |
| --               | Error handling   | Error handling   |
|                  |                  | + Monitoring setup |
|                  |                  |                  |
| --               | --               | Priority support |
|                  |                  |                  |
+------------------+------------------+------------------+
```

6.2 Detailed Package Comparison

FEATURE	STARTER	STANDARD	PREMIUM
Number of workflows	[X]	[X]	[X]
Integrations included	[X]	[X]	[X]
AI/LLM features	Basic	Advanced	Advanced
Error handling	Basic	Comprehensive	Comprehensive
Documentation			
Video walkthrough	-		
Training session	-	[X] min	[X] min
Post-launch support	[X] days	[X] days	[X] days
Monitoring setup	-	-	
Priority support	-	-	
Investment	**$[X,XXX]**	**$[X,XXX]**	**$[X,XXX]**

6.3 Optional Add-Ons

ADD-ON	DESCRIPTION	INVESTMENT
Additional Workflow	Each extra workflow beyond package	$[XXX]
Extended Training	Extra [X]-minute training session	$[XXX]
Monitoring Dashboard	Custom monitoring interface	$[XXX]
Priority Support	[X] months of priority support	$[XXX]/month
Maintenance Retainer	Ongoing support and updates	From $[XXX]/month

6.4 Payment Terms

```
+-----------------------------------------------------------+
|  PAYMENT SCHEDULE                                         |
+-----------------------------------------------------------+
|                                                           |
|  DEPOSIT (50%)          FINAL PAYMENT (50%)               |
|  --------------         --------------------             |
|  $[X,XXX]               $[X,XXX]                          |
|                                                           |
|  Due: Upon signing      Due: Project completion          |
|                                                           |
|  -------------------------------------------------        |
|  - Invoices payable Net [15/30]                          |
|  - Accepted: Bank transfer, Credit card, [Payment method] |
|  - Work begins upon receipt of deposit                   |
|                                                           |
+-----------------------------------------------------------+
```
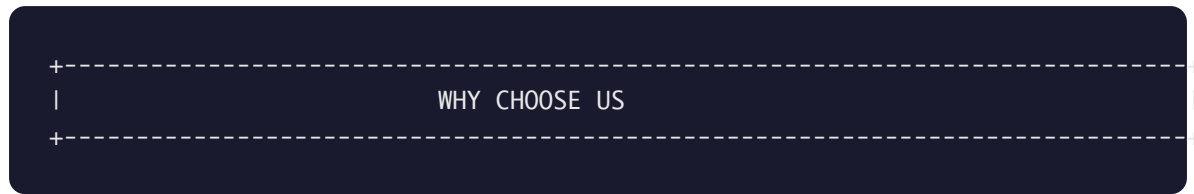
6.5 Return on Investment

```
+-----------------------------------------------------------+
|  ESTIMATED ROI                                            |
+-----------------------------------------------------------+
|                                                           |
|  TIME SAVED                                               |
|  Weekly hours saved:          [XX] hours                 |
|  Annual hours saved:          [XXX] hours                |
|  Value of time saved:         $[XX,XXX]/year             |
|                                                           |
|  ERROR REDUCTION                                          |
|  Estimated error costs saved:  $[X,XXX]/year             |
|                                                           |
|  OPPORTUNITY GAINS                                        |
|  Faster response time value:   $[X,XXX]/year             |
|                                                           |
|  -------------------------------------------------        |
|  TOTAL ANNUAL BENEFIT:         $[XX,XXX]                 |
|  PROJECT INVESTMENT:           $[X,XXX]                  |
|  -------------------------------------------------        |
|  PAYBACK PERIOD:               [X] months                |
|  FIRST YEAR ROI:               [XXX]%                    |
|                                                           |
+-----------------------------------------------------------+
```

7. Why Choose Us

```
+------------------------------------------------------------------------+
|                           WHY CHOOSE US                                |
+------------------------------------------------------------------------+
```

7.1 Our Expertise

CREDENTIAL	DETAILS
Experience	[X]+ years in workflow automation
Projects Completed	[X]+ successful automation projects
Platform Expertise	n8n certified / [X]+ workflows built
AI Integration	Specialized in AI-powered automation
Industry Focus	[Your industry focus/specialization]

7.2 What Sets Us Apart

```
+------------------------------------------------------------+
|                                                            |
|  * BUSINESS-FIRST APPROACH                                 |
|    We focus on solving business problems, not just building|
|    technology. Every workflow is designed for real impact. |
|                                                            |
|  * COMPREHENSIVE DOCUMENTATION                             |
|    You'll never be left wondering how things work. Full docs,|
|    videos, and training included with every project.       |
|                                                            |
|  * ONGOING PARTNERSHIP                                     |
|    We're here for the long term. Post-launch support ensures|
|    your automations continue working smoothly.             |
|                                                            |
|  * TRANSPARENT COMMUNICATION                              |
|    Regular updates, no surprises. You'll always know exactly|
|    where your project stands.                              |
|                                                            |
|  * PROVEN METHODOLOGY                                     |
|    Our structured delivery process ensures consistent,     |
|    high-quality results every time.                        |
|                                                            |
+------------------------------------------------------------+
```

7.3 Client Testimonials

> *"[Testimonial text from a satisfied client about their experience working with you and the results they achieved.]"*
> **– [Client Name], [Title] at [Company]**
> *"[Another testimonial highlighting different aspects of your work.]"*
> **– [Client Name], [Title] at [Company]**

7.4 Relevant Case Studies

Case Study: [Similar Project/Client]

ASPECT	DETAILS
Challenge	[What problem they had]
Solution	[What you built]
Results	[Quantified outcomes - hours saved, money saved, etc.]

[Link to full case study if available]

7.5 Our Guarantee

```
+--------------------------------------------------------------+
|                                                              |
|                  OUR COMMITMENT TO YOU                       |
|                                                              |
|  We stand behind our work with these guarantees:            |
|                                                              |
|  - [X] days of post-launch support included                 |
|  - All workflows tested with real data before delivery      |
|  - Full documentation so you're never dependent on us       |
|  - Clear communication throughout the project               |
|  - [Any other guarantees you offer]                         |
|                                                              |
+--------------------------------------------------------------+
```

8. Next Steps

```
+--------------------------------------------------------------
|                        NEXT STEPS
+--------------------------------------------------------------
```

Ready to Move Forward?

Here's how to get started:

```
+------------------------------------------------------------------+
|                                                                  |
|  STEP 1: SELECT YOUR PACKAGE                                     |
|  ---------------------------                                     |
|  Review the options above and choose the package that           |
|  best fits your needs and budget.                               |
|                                                                  |
|  STEP 2: SIGN THE AGREEMENT                                      |
|  ---------------------------                                     |
|  Once you've decided, we'll send over the service               |
|  agreement for your signature.                                  |
|                                                                  |
|  STEP 3: SUBMIT DEPOSIT                                          |
|  ---------------------------                                     |
|  A 50% deposit secures your spot in our schedule                |
|  and kicks off the project.                                     |
|                                                                  |
|  STEP 4: KICKOFF CALL                                           |
|  ---------------------------                                     |
|  We'll schedule a kickoff call to align on goals,               |
|  gather requirements, and begin the work.                       |
|                                                                  |
+------------------------------------------------------------------+
```

Questions?

If you have any questions about this proposal, please don't hesitate to reach out:

CONTACT METHOD	DETAILS
Email	[YOUR EMAIL]
Phone	[YOUR PHONE]
Calendar	[LINK TO BOOK A CALL]

Proposal Validity

This proposal is valid for **30 days** from [DATE]. Pricing and availability are subject to change after this period.

9. About Us

```
+-------------------------------------------------------------------+
|                           ABOUT  US                               |
+-------------------------------------------------------------------+
```
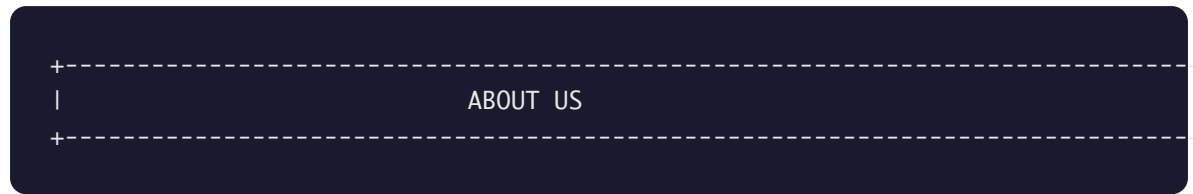
9.1 Company Overview

[YOUR COMPANY NAME]

[2-3 paragraph description of your company, mission, and what you do. Include your focus on AI workflow automation and the value you bring to clients.]

9.2 Our Mission

[Your mission statement or value proposition]

9.3 Key Facts

Founded	[Year]
Specialization	AI Workflow Automation
Platform Expertise	n8n, [Other platforms]
Clients Served	[X]+ businesses
Projects Completed	[X]+ automations
Industries	[Industry 1], [Industry 2], [Industry 3]

9.4 Meet Your Team

[YOUR NAME] – *[Title/Role]*

[Brief bio - 2-3 sentences about your background and expertise]

[TEAM MEMBER NAME] – *[Title/Role]* (if applicable)

[Brief bio]

9.5 Connect With Us

```
+----------------------------------------------------------------+
|                                                                |
|   [YOUR COMPANY NAME]                                          |
|                                                                |
|   Website:    [YOUR WEBSITE]                                   |
|   Email:      [YOUR EMAIL]                                     |
|   Phone:      [YOUR PHONE]                                     |
|   LinkedIn:   [YOUR LINKEDIN]                                  |
|   Location:   [YOUR CITY/REGION]                               |
|                                                                |
+----------------------------------------------------------------+
```

Acceptance

To accept this proposal, please indicate your preferred package below and sign:

Selected Package

- [ ] **Starter** – $[X,XXX]

- [ ] **Standard** – $[X,XXX] (Recommended)

- [ ] **Premium** – $[X,XXX]

Optional Add-Ons

- [ ] [Add-on 1] – $[XXX]

- [ ] [Add-on 2] – $[XXX]

- [ ] [Add-on 3] – $[XXX]

Signature

By signing below, [CLIENT COMPANY] agrees to engage [YOUR COMPANY] under the terms outlined in this proposal. This signature authorizes us to send the formal service agreement.

Signature	_____
Name	_____
Title	_____
Company	_____
Date	_____

```
+================================================================+
|
|                  Thank you for considering [YOUR COMPANY]
|
|              We look forward to partnering with you on this
|              project and helping [CLIENT COMPANY] achieve
|              its automation goals.
|
+================================================================+
```

Proposal Version: 1.0 | Created: [DATE] | Valid Until: [DATE + 30 DAYS]

Prepared by [YOUR NAME] | [YOUR COMPANY] | [YOUR EMAIL]

Appendix A: Technical Specifications

[Optional: Add detailed technical specifications, API documentation, or system requirements here]

Appendix B: Full Case Studies

[Optional: Add complete case studies with detailed information]

Appendix C: Frequently Asked Questions

Q: How long does a typical project take?

A: [Your answer]

Q: What happens if I need changes after the project is complete?

A: [Your answer]

Q: Do I need to provide hosting for n8n?

A: [Your answer]

Q: What if I need additional workflows later?

A: [Your answer]

Q: How do you handle confidential data?

A: [Your answer]

End of Proposal

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