**READ ME: How to Use This Template**

We’ve created this template for you as a Google Doc so you can easily copy the document and then save it to your drive.

**You have VIEW only access to this document. You’ll need to make a copy by following these instructions:**

1. In the menu, click on File > Make a Copy.
2. Type a name and choose where to save it.
3. Click Ok.

Once you copy the document, delete the non-relevant information and then prepare your template that you can copy time and time again for your proposals.   
  
**What to Include in Your Proposal Template**  
Here’s a list of sections we recommend that you include in your proposals. Review and check off what you need to include in your proposals, and make notes on anything else.

* Cover page
* Introduction or situation
* Scope of work
* Timelines
* About your company
* How we work together/what you can expect
* What’s expected from you
* Professional fees
  + Payment terms and conditions
  + Fee breakdown
* Next steps

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**Cover Page**

* Client’s company and their name
* What project or engagement this proposal is for
* Date presented
* Your logo

**Introduction or Situation**

* A summary of what you discussed to show you understand their problem
* Position your proposal as the solution to this problem to set up the scope of work

**Scope of Work**

* What exactly you’ll do for them
* How you’ll do it
* Specifics of deliverables
* Any strategic recommendations for the project should be included

**Timelines**

* A timeline with key phases of the projects and deliverables
* Include something on what happens if the timeline slips

**About Your Company**

* Position your company as the best possible solution
* Share how you do things and why you do things
* Make them want to work with you; speak to your experience and the results you deliver

**What You Can Expect**

* Speak to the experience of working with you
* Establish how things are done including communication, project management, team roles, your values, etc.

**What’s Needed From You**

* Share what they need to contribute to the project so they understand their role in the final product. (This may be providing feedback, providing information as needed, being available, etc.)

**Professional Fees**

* Fee summary to detail out the fees for the project (keep this simple!)
* Break out your payment terms and conditions
  + What’s required to book the project
  + Payment schedule
  + Refunds
  + If hourly, cost for additional hours
  + For retainers, if rolling over hours is allowed
  + How payments can be made

**Next Steps**

* Reiterate why you’re a good fit for the project or engagement
* Outline the next steps
  + Review proposal in detail
  + Accept the proposal or schedule a follow-up call
  + Project kickoff — what happens once they say yes