COMPANY LOGO

BUSINESS PROPOSAL

Prepared for

**[NAME], [RECEIVING PARTY NAME]**

Prepared by

**[TENDERER NAME]**

**[COMPANY NAME]**

[ADDRESS]

[ADDRESS 2]

[CITY]

[PROVINCE], [POSTAL CODE]

Tel: [CONTACT DETAILS]

Email: [EMAIL ADDRESS]

[COMPANY EMAIL]

**SUBMITTED ON [DATE]**

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# Statement of Confidentiality & Non-Disclosure

This document has confidential information. All data submitted to [RECEIVING PARTY] is provided *in re*liance upon its consent not to use or disclose any information contained herein except in the context of its business dealings with [COMPANY NAME]. The recipient of this document agrees to inform present and future employees of [RECEIVING PARTY] who view or have access to the content of its confidential nature.

The recipient agrees to instruct each employee that they must not disclose any information concerning this document to others except to the extent that such matters are generally known to, and are available for use by, the public. The recipient also agrees not to duplicate, distribute or permit others to duplicate or distribute any material contained herein without [COMPANY NAME]'s written consent.

[COMPANY NAME] retains all title, ownership and intellectual property rights to the material and trademarks contained herein, including all supporting documentation, files, marketing material, and multimedia.

BY ACCEPTANCE OF THIS DOCUMENT, THE RECIPIENT AGREES TO BE BOUND BY THE TERMS MENTIONED ABOVE.

# Executive Summary

[COMPANY NAME] is pleased to be able to give [RECEIVING PARTY NAME] with this business opportunity for the [SPECIFY NAME] project. We understand the dynamics of the [SPECIFY] market that [RECEIVING PARTY NAME] faces and recognise the unique opportunity to [DESCRIBE OPPORTUNITY]. We believe that the [SPECIFY] market is in its [GROWING/ MATURING STAGES] and that we are uniquely positioned to successfully [SPECIFY].

Having fully examined your situation, we are confident that our proposed services will effectively address your needs. Our goal is to [BRIEFLY DESCRIBE OBJECTIVE(S)] by [BRIEFLY DESCRIBE STRATEGY or SOLUTION] and to complete this by [DATE], for a total cost of [AMOUNT]. By availing itself of our services, [RECEIVING PARTY NAME] will:

* [LIST KEY BENEFITS OF PURSUING OPPORTUNITY(S)]

Our unique ability to [DESCRIBE SKILLS] and our track record in [MENTION RELEVANT EXPERIENCE] makes us an invaluable partner in the [SPECIFY] market. We look forward to forming a mutually beneficial relationship with [RECEIVING PARTY NAME].

# 1. Company Background

Founded in [DATE] by [FOUNDERS OR GROUP], [TENDERER] ([www.website.com](http://www.website.com/)) is the maker of [SPECIFY] OR offers [DESCRIBE SERVICES] services. Our [PRODUCT/SERVICE] is known for [SPECIFY]. We have been quite successful in [SPECIFY] and notably in [SPECIFY RELEVANT ACCOMPLISHMENTS].

[YOUR COMPANY NAME] currently serves over [NUMBER] clients in [SPECIFY MARKET] and employs [NUMBER] people in the greater [CITY] area. It has won numerous awards for its [PRODUCT/SERVICE].

**Mission Statement:**

The company’s mission is to [SPECIFY].

**[SERVICES PROVIDED or PRODUCTS]:**

* [LIST YOUR PRODUCTS/SERVICES]
* [LIST YOUR PRODUCTS/SERVICES]

**Offices Locations:**

* [CITY] (Headquarters)
* [CITY]

**[CERTIFICATIONS or ACCREDITATIONS or MEMBERSHIPS]:**

* [CERTIFICATION or ACCREDITATION or MEMBERSHIP]
* [CERTIFICATION or ACCREDITATION or MEMBERSHIP]

**Awards:**

* [AWARD]
* [AWARD]

**Last year's financial results [OPTIONAL]:**

* Revenues: [AMOUNT IN CURRENCY]
* Profit: [AMOUNT IN CURRENCY]

For a detailed look at key employees, please see section 4.3 "Team Qualifications".

[ADDITIONAL OPTIONAL ELEMENTS:

* Company history
* Legal structure
* Company chart
* Board of directors
* Principal shareholders
* Financial projections

# 2. Identification of Needs & Opportunity

## 2.1 [RECEIVING PARTY NAME] Needs

[YOUR COMPANY NAME] understands the needs of [RECEIVING PARTY NAME] to be as such:

General Requirements:

* [STATE REQUIREMENTS]
* [STATE REQUIREMENTS]

Technical Requirements:

* [STATE REQUIREMENTS]

Reporting/Monitoring Methods:

* [METHOD(S)]

Evaluation Methods:

* [METHOD(S)]

Timeline Requirements:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Proposal Submittal** | **Supplier Selection** | **Project Start** | **Initial Review** | **Project Completion** |
| [DATE] | [DATE] | [DATE] | [DATE] | [DATE] |

Cost Requirements:

|  |  |  |
| --- | --- | --- |
| **Monthly Budget** | **Total Budget** | **Budget Overrun Penalty** |
| [AMOUNT] | [AMOUNT] | [AMOUNT] |

## 2.2 Additional Requirements

[COMPANY NAME] has identified the following requirements that should be met in order to successfully complete this project:

* [ADDITIONAL REQUIREMENT(S)]

## 2.3 Assumptions

The following assumptions were made when preparing this proposal:

* [ASSUMPTION(S)]

## 2.4 The Opportunity

[RECEIVING PARTY NAME] has the opportunity to [SPECIFY OPPORTUNITY]. If successfully accomplished, our strategy can yield [SPECIFY RETURN ON INVESTMENT].

After analysing different possibilities and taking into account the strengths and expertise of both companies, we see [NUMBER] additional potential opportunities:

1. [SPECIFY OPPORTUNITY]
2. [SPECIFY OPPORTUNITY]

Market trends, notably [SPECIFY TRENDS], have shaped our proposed strategy as described in section 3.2. [YOUR COMPANY NAME] will be crucial in helping [RECEIVING PARTY NAME] reach a new market, address its clients' needs and force off the threat of [SPECIFY MARKET/COMPETITIVE THREATS].

[ADDITIONAL OPTIONAL ELEMENTS:

* Company SWOT analysis
* Competitive landscape
* Entry Barriers

## 2.5 Project Scope

This project will involve over [NUMBER] [RECEIVING PARTY NAME] employees and require the coordination of [SPECIFY] departments in offices in [SPECIFY CITIES].

Pursuing the [SPECIFY] opportunity will dramatically affecte [SPECIFY] and [SPECIFY].

Please view [ANNEXURE X] for a diagram illustrating the overall workflow and scope of the project.

# 3. Proposed Strategy or Plan

## 3.1 Objectives

We have analysed your present market situation and believe the following objectives can be achieved:

* [SHORT DESCRIPTION OF OBJECTIVE(S)]

## 3.2 Strategy

[DETAILED DESCRIPTION OF YOUR INTENDED STRATEGY AND WHAT IS REQUIRED TO ACHIEVE IT]

[EXPLANATION OF HOW YOUR SOLUTION WILL HELP REACH OBJECTIVES WHILE ADDRESSING COMPANY'S SITUATION]

### 3.2.1 Deliverables

In the course of this project, we will deliver the following:

* [LIST THE MAIN DELIVERABLES]
* [LIST THE MAIN DELIVERABLES]
* [LIST THE MAIN DELIVERABLES]
* [LIST THE MAIN DELIVERABLES]

### 3.2.2 Needs vs Opportunities [OPTIONAL]

The following table shows how [RECEIVING PARTY NAME]'s needs have been taken into consideration when formulating opportunities:

|  |  |  |
| --- | --- | --- |
| **Needs** | **Opportunities** | **Deliverables** |
| [SHORT DESCRIPTION] | [EXPLAIN OPPORTUNITY THAT RELATES TO NEED] | [SPECIFY THE RELATED DELIVERABLE] |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

**Table 1. [PROJECT TITLE] Needs & Opportunities**

### 

### 3.2.3 [PROJECT TITLE] Team

This project will be overseen by [NAME], [TITLE]. He OR She will be in charge of [SPECIFY] and will manage the work done by the following teams:

* Team A – Manager: [NAME] and [TITLE]

Members: [NAME] and [TITLE]

Main Tasks:

* + 1. [TASK 1]
    2. [TASK 2]
    3. [TASK 3]
* Team B – Manager: [NAME] and [TITLE]

Members: [NAME] and [TITLE]

Main Tasks:

* + 1. [TASK 1]
    2. [TASK 2]
    3. [TASK 3]
* Team C – Manager: [NAME] and [TITLE]

Members: [NAME] and [TITLE]

Main Tasks:

* + 1. [TASK 1]
    2. [TASK 2]
    3. [TASK 3]

# 4. Why Choose [YOUR COMPANY NAME]?

## 4.1 Benefits of Our Proposed Plan

When comparing our abilities to that of competitors, the benefits of choosing [YOUR COMPANY NAME] are:

* [LIST THE BENEFITS OF USING YOUR SOLUTION], e.g. improvement in the business model
* High ROI, monthly cost savings, short completion time, reliable service, and lower implementation cost]

## 4.2 Competitive Advantages

The following are competitive advantages that differentiate [YOUR COMPANY NAME] from other providers:

[USE RELEVANT DIFFERENTIATING FACTORS & COMPETITIVE ADVANTAGES]

**4.3 Company Recognition**

Brand awareness: [SHORT EXPLANATION OR SUBSTANTIATING EVIDENCE]

Brand image

Brand identity

Industry recognition

Trust

[OTHER]

**4.4 Expertise & Stability**

Highly knowledgeable workforce: [SHORT EXPLANATION OR SUBSTANTIATING EVIDENCE]

Skilled labour

Technological skills

Powerhouse solution

High-level standards

Stability

[OTHER]

**4.5 Technology**

Performance: [SHORT EXPLANATION OR SUBSTANTIATING EVIDENCE]

Flexibility

Scalability

Reliability

Features and functionality

[OTHER]

**4.6 History of success**

Steady sales growth: [SHORT EXPLANATION OR SUBSTANTIATING EVIDENCE]

Successful track record

Adaptability

Loyal client base

**4.7 Customer Service**

First-class service: [SHORT EXPLANATION OR SUBSTANTIATING EVIDENCE]

24/7 support

Client input

**4.8 [OTHER]**

## 4.8.1 Team Qualifications

**Key Team Members:**

**[NAME], [TITLE]**

[SHORT RESUME HIGHLIGHTING RELEVANT SKILLS/EXPERIENCE]

For a complete resume of key employees, please see [ANNEXURE X].

## 4.8.2 Success Stories

[COMPANY NAME] has worked on similar projects in the past and had successfully [SPECIFY]. Most notable relevant experiences include [SPECIFY PROJECT] where we have [LIST ACCOMPLISHMENTS].

For detailed case studies and testimonials, please see [ANNEXURE X] and [X] respectively.

For our full client list, please see [ANNEXURE X].

# 5. Implementation Plan

## 5.1 Methodology

We have the opportunity to follow the [SPECIFY 1st], [SPECIFY 2nd], [SPECIFY 3rd] methodology in this project. The deliverables shall be provided according to the following methodology because of [SPECIFY ADVANTAGES]: [DESCRIBE METHODOLOGY]

[ADDITIONAL OPTIONAL ELEMENTS:

* Details of technical implementation.
* Product testing
* Training of staff
* Downtime
* Emergency plans

## 5.2 Scheduling

In order to initiate this plan, we first need to [SPECIFY]. It will then be possible to proceed with [SPECIFY] which will allow us to [SPECIFY]. We expect to complete this project in [NUMBER] [HOURS or DAYS or WEEKS or MONTHS or YEARS]. A proposed schedule is summarised in the table below.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Activity ID** | **Activity** | **Dependency**  (ID of related activity) |  | **Duration** | **Start Date** | **Progress Report or**  **Midpoint Review** | **End Date** |
| 1 | [SHORT DESCRIPTION] | [ID] |  | [NUMBER OF DAYS or MAN-HOURS] | [DATE] | [DATE] | [DATE] |
| 2 |  |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |  |
| 4 |  |  |  |  |  |  |  |
| 5 |  |  |  |  |  |  |  |
| 6 |  |  |  |  |  |  |  |
| 7 |  |  |  |  |  |  |  |
| 8 |  |  |  |  |  |  |  |
| 9 |  |  |  |  |  |  |  |
| 10 |  |  |  |  |  |  |  |

**Table 2. Proposed Schedule**

## 5.3 Testing & Evaluation

Testing phases should debut when [SPECIFY POINT IN TIME] and should ensure the successful [IMPLEMENTATION or FUNCTIONING] of the following elements: [SPECIFY CRITICAL SUCCESS FACTORS].

Evaluation will take place on a [DAILY/WEEKLY/MONTHLY] basis.

[EVALUATION METHOD 1] will be used to evaluate [SPECIFY]. [EVALUATION METHOD 2] will be used to evaluate [SPECIFY]. [EVALUATION METHOD 3] will be used to evaluate [SPECIFY].

The following reports will be produced on a [DAILY/WEEKLY/MONTHLY] basis: [SPECIFY REPORTS].

[OPTIONAL] Please see [APPENDIX X] for project evaluation criteria.

### 5.3.1 Performance metrics

The following metrics should be used to measure the success and progress of this project.

[THE FOLLOWING ARE EXAMPLES OF METRICS AGAINST WHICH YOU CAN EVALUATE DELIVERABLES OR THE PROJECT AS A WHOLE]

* Past results
* Industry benchmarks or averages
* Set goals and requirements
* Desired improvements in production levels, quality or cost
* Behaviour-based

Increases attendance or clientele

Number of website visitors, length of stay, depth of navigation, number of clicks

Number of calls received

Number of complaints

Change in customer behaviour/buying patterns

* Cost-based

Conversion rate (proportion of customers who perform a specific action)

Cost per new client acquisition per sale

ROI

Production costs

* Based on brand variables

Customer satisfaction level

Customers’ impression of the brand/product

Brand awareness/recognition levels

Customer loyalty levels

# 6. Costs OR Budget

## 6.1 Cost Breakdown

Based on our analysis of your needs and nature of our proposed plan, the total funds required are estimated to be at [AMOUNT]. The cost budgeting is detailed in the table below.

Estimated man-hours: [NUMBER OF HOURS] (does not include breaks and non-working days).

Total estimated project duration: [NUMBER OF HOURS or DAYS or MONTHS].

Estimated daily cost: [AMOUNT].

[THE FOLLOWING ARE EXAMPLES OF COSTS, ALL MAY NOT APPLY TO YOUR SITUATION]

|  |  |
| --- | --- |
| **Cost Element** | **Amount** |
| Machinery And Equipment |  |
| Raw Materials |  |
| Production & Overhead |  |
| IT Infrastructure (Hardware/Software) |  |
| Labor  Project Manager  General Managers  Team A  Team B  Team C  Maintenance Labor  Payroll Taxes |  |
| Intellectual Property (e.g. trademarks, domain names, patents)  Permits & licenses |  |
| Marketing |  |
| Order processing & billing |  |
| Third Party Services |  |
| Training |  |
| Annual/Monthly Maintenance Fee |  |
| Travel |  |
| Utilities (e.g. long-distance communications, fax, internet connection) |  |
| Freight/Delivery |  |
| Postage |  |
|  |  |
| **Total** | **IN CURRENCY 0,000,000.00** |

**Table 3. Cost Breakdown for [PROJECT TITLE]**

## 6.2 Payment Terms

All equipment, production and general costs (e.g. travel expenses), and man-hours used to complete this project shall be billed. This proposal provides an estimate of total costs. All amounts exceeding this quotation are subject to the approval of [RECEIVING PARTY NAME].

Payments will be made [30 DAYS AFTER RECEIPT OF INVOICE or SPECIFY SCHEDULE]. An initial amount of [AMOUNT] is required to start the project. All late payments are subject to a [1.5% MONTHLY or SPECIFY] charge or the maximum permitted by law.

A discount of [SPECIFY] % will be applicable to early payments.

Payment must be made by [CASH, BANK WIRE, CERTIFIED CHECK or SPECIFY] and must be payable to [TENDERER LEGAL NAME].

## 6.3 Guarantees

[YOUR COMPANY NAME] shall offer the following guarantees:

e.g.

- [PROJECT or SPECIFIC ELEMENT] will be completed by [DATE].

- If [YOUR COMPANY NAME] exceeds total cost estimate by [AMOUNT], it will be subject to a fee of [AMOUNT] % of exceeding amount.

- [SPECIFY ELEMENT] will adhere to [SPECIFY] quality standards; if this is not the case [COMPANY NAME] will be subject to a penalty of [AMOUNT].

# 7. Conclusion

[YOUR COMPANY NAME] is confident that our proposed [SPECIFY] strategy will [SUMMARISE BENEFITS OF YOUR SOLUTION]. We sincerely hope that [RECEIVING PARTY NAME] will consider us as a long-term partner and allow us to enter into a mutually beneficial relationship that will be profitable for both parties. We are available to answer any questions you may have and look forward to discussing this opportunity further.

After reviewing this document, the following steps should be performed in order to come to a final agreement.

- Submission of questions/suggestions

- Counter proposal or approval by [RECEIVING PARTY NAME]

- Negotiation of fees, terms, clauses and conditions

We declare this offer to be binding and free of errors or omissions. Due diligence has been performed in order to ensure that it complies with your requirements and particular situation. We are willing to hold our proposal open for acceptance until [DATE].

Thank you for your interest.

Sincerely,

[TENDERER NAME]

[TITLE]

[COMPANY NAME]

[COMPANY EMAIL]

# Appendix A

**Examples of elements to include in appendices:**

* Supporting information, e.g. third-party studies, quotes, research or test results
* Project workflow diagrams or installation schematics
* Financial projections or supporting calculations
* Success stories: information about similar projects you have completed for other firms and their results
* Testimonials from clients, letters of reference, newspaper clippings, press releases and reviews
* Accreditations and certifications
* Employee resumes
* Company milestones
* Additional terms and conditions
* Limitation of liability
* Applicable law
* Disclaimer

# Appendix B

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# Appendix C

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