**Table of Contents**

Submitted on

[DATE]

Prepared for

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

Prepared by

**[TENDERER NAME]**

**[YOUR COMPANY NAME]**

[YOUR ADDRESS]

[YOUR ADDRESS 2]

[YOUR CITY]

[YOUR STATE/PROVINCE], [YOUR ZIP/POSTAL CODE]

Tel: [YOUR PHONE NUMBER]

Fax: [YOUR FAX NUMBER]

[YOUREMAIL@YOURCOMPANY.COM]

**[Proposal for Services Title]**

**IMAGE OR COMPANY LOGO**

[Statement of Confidentiality & Non-Disclosure 2](#_Toc165870797)

[Executive Summary 3](#_Toc165870798)

[1. Company Background 4](#_Toc165870799)

[2. Identification of Needs 6](#_Toc165870800)

[2.1 [RECEIVING PARTY NAME] Requirements 6](#_Toc165870801)

[2.2 Additional Requirements 7](#_Toc165870802)

[2.3 Assumptions 7](#_Toc165870803)

[2.4 Needs Identification 7](#_Toc165870804)

[2.5 Project Scope 8](#_Toc165870805)

[3. Proposed Services 9](#_Toc165870806)

[3.1 Objectives 9](#_Toc165870807)

[3.2 Services 9](#_Toc165870808)

[3.2.1 Deliverables 9](#_Toc165870809)

[3.2.2 Requirements vs Solution 9](#_Toc165870810)

[3.2.3 [PROJECT TITLE] Team 10](#_Toc165870811)

[4. Why Choose [YOUR COMPANY NAME]? 11](#_Toc165870812)

[4.1 Benefits of Our Proposed Plan 11](#_Toc165870813)

[4.2 Competitive Advantages 11](#_Toc165870814)

[4.3 Team Qualifications 12](#_Toc165870815)

[4.4 Success Stories 12](#_Toc165870816)

[5. Implementation Plan 13](#_Toc165870817)

[5.1 Methodology 13](#_Toc165870818)

[5.2 Implementation Schedule 13](#_Toc165870819)

[5.3 Testing & Evaluation 13](#_Toc165870820)

[5.3.1 Performance metrics 14](#_Toc165870821)

[6. Costs OR Budget 15](#_Toc165870822)

[6.1 Cost Breakdown 15](#_Toc165870823)

[6.2 Payment Terms 16](#_Toc165870824)

[6.3 Guarantees 16](#_Toc165870825)

[7. Conclusion 17](#_Toc165870826)

[Appendix A 18](#_Toc165870827)

[Appendix B 19](#_Toc165870828)

[Appendix C 20](#_Toc165870829)

# Statement of Confidentiality & Non-Disclosure

This document contains proprietary and 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 [YOUR COMPANY NAME]. The recipient of this document agrees to inform present and future employees of [RECEIVING PARTY] who view or have access to its content of its confidential nature.

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BY ACCEPTANCE OF THIS DOCUMENT, THE RECIPIENT AGREES TO BE BOUND BY THE AFOREMENTIONED STATEMENT.

# Executive Summary

[YOUR COMPANY NAME] is pleased to present [RECEIVING PARTY NAME] with this proposal for the [SPECIFY NAME] project. We understand the [DESCRIBE PROBLEM or NEED] that [RECEIVING PARTY NAME] is faced with and recognise the unique opportunity to [DESCRIBE OPPORTUNITY TO SOLVE PROBLEM OR FULFIL NEED]. We believe that the [SPECIFY] market is in its [GROWTH or MATURING or OTHER] stage and that we are uniquely positioned to successfully [SPECIFY].

Having duly examined your requirements, 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 RETAINING YOUR SERVICES]
* [LIST KEY BENEFITS OF RETAINING YOUR SERVICES]
* [LIST KEY BENEFITS OF RETAINING YOUR SERVICES]
* [LIST KEY BENEFITS OF RETAINING YOUR SERVICES]

Our unique ability to [DESCRIBE SKILLS] and our successful track record in [MENTION RELEVANT EXPERIENCE] makes us an enviable partner in this project. We look forward to forming a mutually rewarding 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 the popular [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] customers in [SPECIFY REGION OR 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]:**

PRODUCT IMAGE

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

**Offices Locations:**

COMPANY/FACILITY

IMAGE

* [CITY] (Headquarters)
* [CITY]
* [CITY]
* [CITY]

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

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

**Awards:**

* [AWARD]
* [AWARD]
* [AWARD]

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

* Revenues: [AMOUNT]
* Profit: [AMOUNT]

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

[ADDITIONAL OPTIONAL ELEMENTS:

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

# 2. Identification of Needs

## 2.1 [RECEIVING PARTY NAME] Requirements

[YOUR COMPANY NAME] understands the requirements to be as such:

General Requirements:

* [STATE REQUIREMENTS]
* [STATE REQUIREMENTS]
* [STATE REQUIREMENTS]
* [STATE REQUIREMENTS]
* [STATE REQUIREMENTS]

Technical Requirements:

* [STATE REQUIREMENTS]
* [STATE REQUIREMENTS]
* [STATE REQUIREMENTS]
* [STATE REQUIREMENTS]
* [STATE REQUIREMENTS]

Reporting/Monitoring Methods:

* [METHOD]
* [METHOD]
* [METHOD]

Evaluation Methods:

* [METHOD]
* [METHOD]

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

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

* [ADDITIONAL REQUIREMENT]
* [ADDITIONAL REQUIREMENT]
* [ADDITIONAL REQUIREMENT]

## 2.3 Assumptions

The following assumptions were made when preparing this proposal:

* [ASSUMPTION]
* [ASSUMPTION]
* [ASSUMPTION]
* [ASSUMPTION]

## 2.4 Needs Identification

[RECEIVING PARTY NAME] has the following needs: [SPECIFY].

After analysing different scenarios and taking into account the strengths and expertise of both companies, we see the following [NUMBER] potential solutions:

1. [SPECIFY SOLUTION]
2. [SPECIFY SOLUTION]
3. [SPECIFY SOLUTION]

Industry trends, notably [SPECIFY TRENDS], have shaped our proposed services as described in section 3.2. [YOUR COMPANY NAME] will be instrumental in helping [RECEIVING PARTY NAME] reach its [MARKET AUDIENCE], address its clients' needs and stave off the threat of [SPECIFY MARKET/COMPETITIVE THREATS].

[ADDITIONAL OPTIONAL ELEMENTS:

* Company SWOT analysis (Strengths / Weaknesses / Opportunities / Threats)
* Competitive landscape
* Barriers to entry]

## 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].

The successful implementation of [SPECIFY YOUR SOLUTION], will dramatically effect [SPECIFY] and [SPECIFY].

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

# 3. Proposed Services

## 3.1 Objectives

We have analysed the present situation and believe the following objectives must be achieved:

* [SHORT DESCRIPTION OF OBJECTIVE]
* [SHORT DESCRIPTION OF OBJECTIVE]
* [SHORT DESCRIPTION OF OBJECTIVE]

## 3.2 Services

[DETAILED DESCRIPTION OF YOUR INTENDED STRATEGY AND THE SERVICES THAT WILL HELP ACHIEVE IT]

[EXPLANATION OF HOW YOUR SERVICES WILL HELP REACH OBJECTIVES WHILE ADDRESSING REQUIREMENTS]

### 3.2.1 Deliverables

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

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

### 3.2.2 Requirements vs Solution

The following table shows how each requirement will be addressed:

| **Requirements** | **Solutions** | **Deliverables** |
| --- | --- | --- |
| [SHORT DESCRIPTION] | [EXPLAIN HOW SOLUTION ADDRESSES REQUIREMENT] | [SPECIFY THE RELATED DELIVERABLE] |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

**Table 1. [PROJECT TITLE] Requirements & Solutions**

### 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], [TITLE]

Members: [NAME], [TITLE], [NAME], [TITLE], [NAME], [TITLE], [NAME], [TITLE]

Main Tasks:

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

Members: [NAME], [TITLE], [NAME], [TITLE], [NAME], [TITLE], [NAME], [TITLE]

Main Tasks:

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

Members: [NAME], [TITLE], [NAME], [TITLE], [NAME], [TITLE], [NAME], [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 capabilities and proposed solution to that of competitors, the benefits of choosing [YOUR COMPANY NAME] are:

* [LIST THE BENEFITS OF USING YOUR SOLUTION, e.g. improvement in business model, high ROI, monthly cost savings, short time to completion, service reliability, 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]

* **Company Recognition**

Brand awareness: [SHORT EXPLANATION OR SUBSTANTIATING EVIDENCE]

Brand image: …

Brand identity: …

Industry recognition: …

Trust: …

[OTHER]

* **Expertise & Stability**

Highly knowledgeable workforce: [SHORT EXPLANATION OR SUBSTANTIATING EVIDENCE]

Skilled labour: …

Technological skills: …

Powerhouse solution: …

High-level standards: …

Stability: …

[OTHER]

* **Technology**

Performance: [SHORT EXPLANATION OR SUBSTANTIATING EVIDENCE]

Flexibility: …

Scalability: …

Reliability: …

Features and functionality: …

[OTHER]

* **History of success**

Steady growth in sales: [SHORT EXPLANATION OR SUBSTANTIATING EVIDENCE]

Successful track record: …

Adaptability: …

Loyal client base: …

* **Customer Service**

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

24/7 support: …

Client input: …

* **[OTHER]**

## 4.3 Team Qualifications

**Key Team Members:**

**[NAME], [TITLE]**

[SHORT RESUME HIGHLIGHTING RELEVANT SKILLS/EXPERIENCE]

**[NAME], [TITLE]**

[SHORT RESUME HIGHLIGHTING RELEVANT SKILLS/EXPERIENCE]

**[NAME], [TITLE]**

[SHORT RESUME HIGHLIGHTING RELEVANT SKILLS/EXPERIENCE]

**[NAME], [TITLE]**

[SHORT RESUME HIGHLIGHTING RELEVANT SKILLS/EXPERIENCE]

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

## 4.4 Success Stories

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

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

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

# 5. Implementation Plan

## 5.1 Methodology

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

[ADDITIONAL OPTIONAL ELEMENTS:

* Technical implementation details
* Product testing and beta phases
* Staff training
* Downtime
* Recovery & emergency plans]

## 5.2 Implementation Schedule

In order to begin this project, 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] [DAYS or WEEKS or MONTHS or YEARS] or in [NUMBER] man-hours. The implementation 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

etc.

* Cost-based

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

Cost per new client acquisition/cost per sale

ROI

Production costs

etc.

* Based on brand variables

Customer satisfaction level

Customers’ impression of brand/product

Brand awareness/recognition levels

Customer loyalty levels

etc.

* Hybrid (combination of above elements)

# 6. Costs OR Budget

## 6.1 Cost Breakdown

Based on our analysis of your needs and the nature our proposed solution, the total funds required are estimated at [AMOUNT]. The cost breakdown 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) |  |
| Labour  Project Manager  General Managers  Team A  Team B  Team C  Maintenance Labour  Payroll Taxes |  |
| Intellectual Property (e.g. trademarks, domain names, patents)  Permits & licences |  |
| 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** | **R0,000,000.00** |

**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 will 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 shall 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]% shall be applied to early payments.

Payment must be remitted by [CASH, BANK WIRE, CERTIFIED CHEQUE or SPECIFY] and must be made 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 penalty fee of [AMOUNT]% of exceeding amount.

- [SPECIFY ELEMENT] will adhere to [SPECIFY] quality standards; if this is not the case [YOUR 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. 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 compliance with your requirements and particular situation. We agree to hold our proposal open for acceptance until [DATE].

Thank you for your interest.

Sincerely,

[TENDERER NAME]

[TITLE]

[YOUR COMPANY NAME]

# 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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