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[Your Business Name]

Proposal for

[Future Client]

Date:

[Created date]

Created by:

[POC name, title]

Prepared for:

[Client name, title]

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HubSpot tip: Every proposal should be client-centered, so be sure to update this template to meet the specific needs of your customer.

Intro

The introduction of any proposal is your opportunity to give a potential client more information about your business (but not too much, more detailed info on your business and team will come later). Show your prospect that you've done research and understand their background and business, then explain why you are a good fit to help them meet their goals.

The introduction should also mention what the proposal includes as well as how the client can get in touch if they have any questions. Keep in mind that proposals should help seal the deal, not start the sales process.

Challenges and Goals

A potential client is looking for a service provider to help them solve some challenges they've encountered. Before you start your proposal, you need to have an understanding of these challenges so you can position the right services and show results to your potential new client. Clients will choose a service provider based on their ability to identify the *right* goals, so it's important that you clearly understand the needs of your potential client to ensure you win their business!

In this part of the proposal, list the specific challenges, goals and how you will measure successful outcomes for each goal. What metrics will you use to know whether the goal was achieved? How will the client know that your methods are working?

- Goal 1

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- Goal 2

Check out these blog posts on [how to set inbound marketing goals](#) and [sales goals!](#)

Approach and Deliverables

This is an important part of the proposal as it gives you the opportunity to show your client that you are the expert and that you can solve their problems. At this point, you won't have a detailed view of the client's business, so providing a high-level overview is all you need.

However providing an insight into best practices in the industry, trusted methodologies and how your business typically approaches these types of challenges is always a good way to build trust with your potential client.

Next, you'll need to describe the tasks you'll undertake during the project. The form that this section takes depends on what field you are in. For example, you might include a list of deliverables (e.g., reports, documents, products) that you will submit to the client, or you might list the different phases of assessment that you will go through. Be sure to address all of the major steps in the process.

Breakdown of services

Think of this section as a mini statement of work (SOW). It should outline each activity that needs to happen e.g. Tech stack audit, CRM mapping, paid advertising, weekly consulting, the person who will make it happen, and key dates for each activity. This will give your prospective client clarity into what you will plan to deliver. Also by detailing each activity, you can iterate how measurable your approach is which is always important to clients who care about return on their investment.

The team and who we are

This is the part where you have the opportunity to make your business stand out from the crowd and pique the potential client's interest with the people they will be working with.

This should be your business's elevator pitch, but it's less about recognition and more about what it would be like to work with your team. It's a good time to talk about your values (if they align well with your potential clients) and intro the team who will be ensuring the client's goals are met. If appropriate, include headshots and a bio on each person as it's a great way to excite and address potential chemistry of the relationship.

Your [investment](#)

Now that you have explained that you understand the challenges and how you plan to address them, you can tell the prospective client how much your services will cost. There are many ways to present this part of the proposal, but you should aim to be clear and concise. You could separate out each activity (similar

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to the ‘breakdown of services’ section) and then add columns for the rate and hours that each activity will take. Then simply all add columns to give the prospect a total cost for your services.

Client testimonials

Word-of-mouth and referrals have never been more important in the world of business. People trust other client referrals more than they trust sales people. By including relevant testimonials or case studies your prospective client can hear from others that you are capable of delivering the results you’re promising.

Terms and the contract

Describe the contract, any guarantees, and the terms and conditions. Your business may have pre written documents that you could insert here. Consider documenting the Service Level Agreement to outline how you will work together to ensure a smooth delivery on the goals outlined. This may include the frequency of meetings, response times, ownership and accountability for different tasks both in your business and in the client’s.

If these documents are very long, you can reference them in the text and then provide them in an appendix.

Enter the names and titles of the decision-makers who will need to sign the agreement in order to approve the project.

[Name], [Title]

[Name], [Title]

[Name], [Title]

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