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# Statement of Confidentiality & Non-Disclosure

This document contains both 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 apart from in the context of its business dealings with [YOUR COMPANY NAME]. The recipient of this document agrees to inform both present and future employees of [RECEIVING PARTY] who view or have access to the content.

The recipient agrees to instruct each employee that they may not disclose any information concerning this document to others except to the extent that such matters are 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 within without [YOUR COMPANY NAME]'s written consent.

[YOUR 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 IN THE ABOVE STATEMENT.

# Executive Summary

[YOUR COMPANY NAME] is pleased to present [RECEIVING PARTY NAME] with this proposal for the [SPECIFY NAME] plan. We understand the [DESCRIBE PROBLEM or NEED] that [RECEIVING PARTY NAME] struggles 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 [SPECIFY].

Having carefully 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 have this done by [DATE], for a cost of [AMOUNT]. By gaining our services, [RECEIVING PARTY NAME] will:

* [LIST KEY BENEFITS OF RETAINING YOUR SERVICES]
* [LIST KEY BENEFITS OF RETAINING YOUR SERVICES]

Our ability to [DESCRIBE SKILLS] and our track record in [MENTION RELEVANT EXPERIENCE] makes us a good partner for this project. We look forward to forming a rewarding relationship for both parties with [RECEIVING PARTY NAME].

# 1. Company Background

Founded in [DATE] by [FOUNDERS OR GROUP], [TENDERER] (WEBSITE) is the producer of the popular [SPECIFY] OR offers [DESCRIBE SERVICES]. Our [PRODUCT/SERVICE] is renowned for [SPECIFY]. We have been very successful in [SPECIFY] and more specifically in [SPECIFY RELEVANT ACCOMPLISHMENTS].

[YOUR COMPANY NAME] currently serves over [NUMBER] customers in [SPECIFY PROVINCE OR MARKET] and employs [NUMBER] people in the [CITY] area. It has also won many prestigious awards for its [PRODUCT/SERVICE].

**Mission Statement:**

Our 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]

**Award(s):**

* [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:

* Firm history
* Legal structure
* Organisational chart
* Board of directors
* The Principal shareholders
* Financial estimations

# 2. Identification of Needs

## 2.1 [RECEIVING PARTY NAME] Requirements

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

General Requirements:

* [STATE REQUIREMENTS]
* [STATE REQUIREMENTS]

Technical Requirements:

* [STATE REQUIREMENTS]
* [STATE REQUIREMENTS]

Monitoring Method(s):

* [METHOD]

Evaluation Methods:

* [METHOD]
* [METHOD]

Timeline:

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

Cost:

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

## 2.2 Additional Requirements

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

* [ADDITIONAL REQUIREMENT]

## 2.3 Assumptions

The following assumptions were made in preperation for this proposal [LIST BELOW]:

* [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 [LIST BELOW]:

* [SPECIFY SOLUTION]

Industry trends, most notably [SPECIFY TRENDS], have been the focus of 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 beat off the threat of [SPECIFY MARKET/COMPETITIVE THREATS].

[ADDITIONAL OPTIONAL ELEMENTS:

* Business SWOT analysis (Strengths / Weaknesses / Opportunities / Threats)
* Competitive landscape
* Potential entry barriers

## 2.5 Project Scope

This project will numerous parties including [NUMBER] [RECEIVING PARTY NAME] employees and also requires the coordination of [SPECIFY] departments in offices in [SPECIFY CITIES].

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

Please view [ANNEXURE] for a diagram showing the overall scope of the project.

# 3. Proposed Services

## 3.1 Objectives

Having analysed the current situation, we believe the following objective(s) must be achieved [LIST BELOW]:

* [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

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

* [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 met:

|  |  |  |
| --- | --- | --- |
| **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 managed by [NAME], [TITLE]. He OR she will be in charge of [SPECIFY] and will oversee the work done by the following teams:

* Team A – Manager: [NAME], [TITLE]

Members: [NAME], [TITLE]

Main Task(s):

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

Members: [NAME], [TITLE]

Main Task(s):

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

Members: [NAME], [TITLE]

Main Task(s):

* + 1. [TASK 1]

# 4. Why Choose [YOUR COMPANY NAME]?

## 4.1 Benefits of Our Proposed Plan

When analysing our capabilities and proposed solutions against that of our 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 time to completion, reliability, and lower cost of implementation

## 4.2 Competitive Advantages

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

[USE RELEVANT DIFFERENTIATING FACTORS & COMPETITIVE ADVANTAGES]

* **Company Recognition**

Brand awareness [SHORT EXPLANATION OR SUBSTANTIATING EVIDENCE]

Brand image

Brand identity

Recognition within the industry

Trust

[OTHER]

* **Expertise & Stability**
* Highly knowledgeable workforce [SHORT EXPLANATION OR SUBSTANTIATING EVIDENCE]
* Skilled labourers
* Technological skills
* High-level standards
* Stability

[OTHER]

* **Technology**
* Performance [SHORT EXPLANATION OR SUBSTANTIATING EVIDENCE]
* Flexibility
* Scalability
* Reliability, Features and functionality

[OTHER]

* **History of success**
* Steady sales growth [SHORT EXPLANATION OR SUBSTANTIATING EVIDENCE]
* Successful track record
* Ability to Adapt
* Loyal client base
* **Customer Service**
* First-class service [SHORT EXPLANATIONOR] SUBSTANTIATING EVIDENCE]
* 24/7 support
* Client input

[OTHER]

## 4.3 Team Qualifications

**Key Team Member(s):**

**[NAME], [TITLE]**

[SHORT CURRICULUM VITAE HIGHLIGHTING RELEVANT SKILLS/EXPERIENCE]

**[NAME], [TITLE]**

[SHORT CURRICULUM VITAE HIGHLIGHTING RELEVANT SKILLS/EXPERIENCE]

For a complete resume of all important employees, please see [ANNEXURE].

## 4.4 Success Stories

[YOUR 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], [SPECIFY PROJECT] where we have [LIST ACCOMPLISHMENTS] and [SPECIFY PROJECT] where we have [LIST ACCOMPLISHMENTS].

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

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

# 5. Implementation Plan

## 5.1 Methodology

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

[ADDITIONAL OPTIONAL ELEMENTS:

* Technical implementation details
* Product testing
* Staff training
* Downtime
* Recovery & emergency plans

## 5.2 Implementation Schedule

In order to begin this project, we need to first [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 [ANNEXURE] for the criteria of project evolution.

### 5.3.1 Performance metrics

The following metrics should be used to measure progress, as the realization of this project.

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

* Past results
* Market benchmarks
* Goals and requirements
* Aspirations in improvements in production levels, quality and costs
* Behavioural variables:

Increases attendance and/or boosts clientele numbers

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

Number of calls received

Number of complaints

Change in customer behavior/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 the brand/product

Brand awareness/recognition levels

Customer loyalty

* Hybrid (combination of above elements)

# 6. Costs OR Budget

## 6.1 Cost Breakdown

Based on our projection of your needs and nature of our proposal, the total funds required are estimated to be around the figure of [AMOUNT]. The cost breakdown is detailed in the table below.

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

Planned duration: [NUMBER OF HOURS or DAYS or MONTHS].

Projected 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) |  |
| LaborProject 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** | **[AMOUNT IN CURRENCY]** |

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

## 6.2 Payment Terms

All equipment, production, general costs and man-hours used to complete this project will be billed. This proposal provides an estimate of total costs. All amounts exceeding this estimated 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 made by [CASH, BANK WIRE, CERTIFIED CHECK or SPECIFY] and must be made payable to [TENDERER LEGAL NAME].

## 6.3 Guarantees

[YOUR COMPANY NAME] will give us the following guarantees:

* [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 further payment 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 payment of [AMOUNT].

# 7. Conclusion

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

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 it fits with your requirements and situation. We agree to hold our proposal open for your consideration until [DATE].

Thank you for your interest.

Kind regards,

[TENDERER NAME]

[TITLE]

[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

**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
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* Employee resumes
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# Appendix C

**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
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* Testimonials from clients, letters of reference, newspaper clippings, press releases and reviews
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