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| Business ProposalTemplate |

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You can edit your own version in one of two ways:

1. Edit this version to fit your needs
2. Go to “File” > “Download As” > “Microsoft Word” to Download

**How to Use This Template**

*Use this template to wow your prospects and land your next client. We carefully crafted this template with everything you need to help your business stand out from the rest.*

No matter what kind of business you have, you will need to write a proposal at some point. You might respond to a Request for Proposals (RFP) that you saw advertised on an industry website, or you might receive an invitation directly from a potential client. Either way, it is essential to construct a clear, comprehensive response.

Keep in mind, this template is designed to be completely customized by your company. You can adapt this template to meet the specific requirements of your potential client. If you feel there are sections included that you would rather omit, or if you think a section is missing, you are encouraged to make those changes as you see fit for your business.

Each section has *italicized instructions* that should be deleted before writing the sections, alongside a [Bracketed Prompt] to note where the section starts.

Once complete, share it with your team for approval or send it right to your prospects.

We’ve included one **long** proposal template to flesh out the details of your proposal, alongside one **short** proposal template for a more succinct approach.

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| [Click Here](#gy4e0kch7edb) to Jump to the *Long Version* of the Business Proposal Template | [Click Here](#3o210k4uxcy2) to Jump to the *Short, One-Page Version* of the Business Proposal Template |

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*Keep scrolling to templates*

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| Business Proposal Template*Long Version* |
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Business Proposal Template [Long]

Problem Summary

*Projects are typically developed around problems that need to be solved. In this section, show the potential client that you understand the history of the problem and the unique requirements that it entails.*

*Keep your proposal customer-focused. Make the client feel like you understand them better than any of your competitors.*

[Insert Problem]

|  |  |
| --- | --- |
|  | HubSpot TipThink of the organization of this section like a funnel. Start with a broad description of the context, then continue to give more specifics about the potential client and their general needs, and finally hone in on the particular problem at hand. |

# Proposed Solution

*This section is the heart of your proposal. Present your solution in as much detail as possible, preferably in a step-by-step format that addresses all of the client’s requirements.*

*To really drive home the point that your offering meets all of the client’s needs, consider providing a “features and benefits” table like the one below. It outlines key parts of your product or service and their specific value to the potential client. You can add more rows here by right-clicking on one of the rows and selecting “Insert row below.”*

|  |  |
| --- | --- |
| **Product/Service Feature** | **Benefit to the Client** |
|   |   |
|   |   |
|   |   |

|  |  |
| --- | --- |
|  | HubSpot TipKeep your solution focused on the client. Be specific about how you will meet their unique requirements. Using a proposal template is helpful, but you need to tailor it to every new project. |

# Pricing Information

*While the Proposed Solution section is important for persuading the potential client to choose your company, it is also crucial to provide a well-documented, competitive pricing summary. Make sure you include pricing for everything that you described in the previous section.*

*Depending on the good or service you are providing, you might be paid on a fixed fee, hourly, or per unit basis. You might want to suggest a one-time payment or a series of installments. If you are paid in multiple installments, consider detailing this in a Pricing Schedule.*

*You should also list and explain any assumptions that, if they were to change, would alter the price of your proposal. For example, the number of in-person meetings required, the start and completion dates of the contract, and the number of rounds of revisions allowed.*

[Insert Pricing Information]

|  |  |
| --- | --- |
|  | HubSpot TipIf your pricing structure is complicated, consider using Microsoft Excel, Google Sheets, or [HubSpot’s Sales Pricing Calculator](https://offers.hubspot.com/sales-pricing-calculator) to determine your final price. You can provide the price in this format or transfer it to your proposal document. |

# Proposed Schedule

*Whether or not your client specified an expected completion date, you will want to propose one. You should offer a detailed schedule of the phases needed to meet the requirements of the proposal. Also, describe the deliverables associated with each phase.*

*Consider presenting the schedule graphically in a timeline or as a table with activities and dates, as shown below. You can add more rows here by right-clicking on one of the rows and selecting “Insert row below.”*

|  |  |
| --- | --- |
| **Project Activity** | **Date of Completion** |
|   |   |
|   |   |
|   |   |
|   |   |

|  |  |
| --- | --- |
|  | HubSpot TipA project schedule is an essential tool for successful project management. By providing a detailed schedule in your proposal, you can show the client that you are committed to completing the project by the deadline. |

# Conclusion

*It’s always a good idea to simplify things for the customer. Begin the conclusion by briefly stating why you are the best choice to meet the requirements. Describe the next steps and confirm your availability for future discussions. Then, rather than make them search for it, provide detailed contact information right at the end of your proposal, so the client can get in touch with you easily.*

[Insert Conclusion]

|  |  |
| --- | --- |
|  | HubSpot TipConsider including a signature page directly in your proposal. This way, the client can sign right away without having to request an additional document. |

# Terms and Conditions

*Include your company’s terms and conditions. The terms and conditions indicate the provisions, requirements, rules, specifications, and standards on which the resulting contract will be based, such as legal agreements, termination rules, or anything else that needs to be spelled out in plain language.*

[Insert Terms and Conditions]

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|  | HubSpot TipBe sure to make any adaptations that are necessary for this specific proposal. |

# Appendices

*Appendices are a good place to include any information that you think is important, but that the client did not specifically request. Also, it is a good place to insert documents that are too large to include within the document. You can reference the proposal and attach them here so that they do not interrupt the flow of the narrative.*

[Insert Appendices]

|  |  |
| --- | --- |
|  | HubSpot TipItems for the Appendices include the bios and/or resumes of the team that would work on the project, photos of products you will use in the solution, or screenshots of your software solution. |



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| Business Proposal Template*Short Version* |

Business Proposal Template [Short]

|  |
| --- |
| **Problem Summary** |
| **Proposed Solution** |
| Product/Service Feature | Benefit to the Client |
| 1.  | 1.  |
| 2.  | 2.  |
| 3.  | 3.  |
| **Pricing Information** |
| **Proposed Schedule** |
| Project Activity | Date of Completion |
| 1.  | 1.  |
| 2.  | 2.  |
| 3.  | 3.  |
| 4.  | 4.  |
| **Conclusion** |
| **Terms & Conditions**  |
| **Signature:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | **Date:** \_\_\_\_\_\_\_\_\_\_\_ |

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