

Business Locations

Key contact numbers etc.

Address:

<Building Name>,

<City>

<State>, <Pin: >

Submitted To,

Customer Contact

Role

Your Logo Here

Proposal Date: DD-MM-YYYY

<Confidential Declaration>

Expiry Date: DD-MM-YYYY

Submitted By,

Your Contact

Role

Proposal - <Project Name> <Customer Name>

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# Cover Letter

To,

<Customer Name>

<Role>

<Address>

From,

<Your Name>

<Your Role>

<Your Address>

Dear Sir/Madam,

<Body>

<Thanks and Regards>

<Your Name>

# Executive Summary

<About Customer>

<Our understanding of context and challenges>

<Brief of proposed solution and benefits>

<Timeline & Cost>

# Company Information

<Brief About Company>

<Key Achievements>

<Technical Capabilities>

<Key Customers>

<Partnerships>

# Project Description

## Overview

<Business Overview>

<Project Overview>

### Objectives

<List of objectives – Long Term, Short Term>

### Key Challenges

<List of challenges – Business, Technology, People, Process>

## Scope of work

<Overall Scope>

<Process Diagram>

### Functional Scope

<List of functionalities, description, modules, sub modules >

<Functional Architecture Diagram>

### Non Functional Scope

<List of non-functional features – Security, Performance, Compliance>

### Integration Scope

<List of integrations and scope of coverage>

## Out of Scope

<List of out of scope – Related to features, subscription costs, Infra etc.>

## Assumptions

<List of assumptions – Related to features, integrations, people, process etc >

# Solution Description

## Overview

<High level description of solution>

## Solution Benefits

<list of solution benefits – Against challenges + Cost, Scalability, Performance, GTM, etc. >

## Technology Solution

<Details of solution approach>

<Solution Architecture Diagram>

<Technology Solution>

## Delivery Approach

<Delivery Phases>

<Project Management Approach>

<Communication Plans>

<Governance Approach>

< Risk Mitigations >

<Change Management>

## Team Structure

<team Structure Diagram>

<List of Team Members, Role and a short description of their activities>

## Timeline & Deliverables

<Gantt Chart>

<List of Deliverables>

# Project Commercials

<Pricing Table>

<Clauses related to taxation and other expenses>

<Payment Milestones & Schedule>

# Next Steps

<Information on next steps – Proposal Walkthrough, Onboarding Initiation, etc>

Bonus Tips

* Follow a process were the proposal structure gets shared to everyone during initial stages itself. This will help them to align with the overall structure
* Against each section mark, who is expected to contribute to that. It can be a name or department name
* When giving proposal for few, track changes. It will help us to trace back to old versions.
* Maintain consistency in terms.
* Use industry standard Jargons.
* Try to describe processes through diagrams. Include as much as diagrams as possible.
* Use tables for content where multiple people needs to collaborate. If in image format, it will be difficult to update content.

**Most importantly**

* Offer a walkthrough of proposal to your customer.
* Prepare a deck in parallel, which is a trimmed down version of proposal. This may be useful during discussions with C-level professionals on client side