[Company name]

How to use this document: delete this paragraph before saving, sharing, or circulating it. Every part shown in blue is yours to replace: type your own details over each blue [field] until no blue remains. Add or remove table rows to fit your needs. Then select all (Ctrl+A) and set the font colour to the same dark colour throughout. What is left is your finished document.

Sales Proposal Template

Putting a sales proposal to a client in writing: their needs, the solution offered, the price, the terms, and a place to accept.

Document	Sales Proposal Template
Prepared by	[Name and role]
Owner	[Name and role]
Version	1.0
Date	[DD Month YYYY]
Review date	[DD Month YYYY]

Proposal introduction

Dear [Client contact],

Thank you for the opportunity to propose a solution for [Client company]. [Company name] proposes [Proposed solution].

This proposal is dated [Proposal date] and remains valid until [Proposal valid until].

Client needs and proposed solution

Field	Entry
Client company	[Client company]
Client contact	[Client contact]
Needs identified	
Proposed solution	[Proposed solution]
What is included	
What is excluded	

Scope of work

1. Confirm the scope in writing with [Client contact] before work starts.
2. Deliver each item in the agreed scope in the order listed.
3. Record any change to scope in writing and agree its effect on price and timescale before proceeding.

Pricing and terms

Item	Description	Price

[Company name]

Total proposal value	Total of all items listed above	[Total proposal value]

Field	Entry
Payment terms	[Payment terms]
Proposal valid until	[Proposal valid until]

Acceptance

Field	Entry
Accepted by (client name)	
Client signature and date	
Accepted by ([Company name])	
Start date agreed	
Acceptance notes	

Completion checklist

	The client company ([Client company]) and contact ([Client contact]) are named on the proposal.
	The total value ([Total proposal value]) matches the sum of the pricing table.
	Payment terms ([Payment terms]) and the validity date ([Proposal valid until]) are stated.