



TRAINER'S BOX®

Everything that goes into a killer service provider business proposal

Your complete checklist

keep

Not all business needs are the same, so not all business proposals should be the same. However, there are some important elements that should be included if you want to blow your competition out of the water. We've created this handy checklist so you can make sure you've included all the important stuff.

Title page (optional)

At a minimum, your title page should include the name and contact information of the prospect you've prepared the proposal for, your business's name, and contact information. It's also a smart move to include your company's logo.

Cover letter

Persuasive but to-the-point, your cover letter should motivate your prospect to want to read through your entire proposal. In your cover letter quickly summarize the information stated in your business proposal, like important requirements, the solution you provide, and the end-results your prospect can expect from choosing your business.

Table of contents (optional)

Executive summary

Here you will present the case for your company over others. Summarize your business and the services you provide, and your value proposition (or how your services solve your customers' problems).

Proposed solution

Paint a picture of how you plan to solve your prospect's problem. You will need to clearly and concisely summarize your methodology, qualifications, and (if necessary) your schedule and benchmarks. (**TIP:** It may be helpful to complete the below sections before writing this section.)

Methodology

Layout the steps you will follow to complete the task in question. Include as many necessary details here as possible. Be sure to be clear, concise, and use jargon-free writing.

□ **Qualifications**

Here is where you can (tactfully) brag about your business: any relevant education, years of experience, and training or certifications that relate to what you're offering. Your goal is to convince your prospect your business is the best fit for the job.

□ **Team members (optional)**

If you have other employees to help you with this job and have already planned out the roles they will play, you can share it in this section. This gives your prospect visibility to the stakeholders on your end and a reassurance that you've already thought through how your team will help to deliver your solution.

□ **Schedule and timeline benchmarks**

If the prospect has given you a desired timeline, use that as a foundation for creating your own list of deliverables and timeline benchmarks. Be realistic: If you think your job will take longer, make note of this. Most clients prefer quality over speed, and after all, you are the expert.

□ **Pricing, payment, and legal matters**

Here is where you'll outline your estimate of cost for the project and how payment can be made. Additionally, you should include any legal requirements that will need attention during your job, like licensing or permits.

□ **Client testimonials (optional)**

It's not always expected, but including positive client testimonials from previous jobs provides further supporting evidence for why your business is the best for the job.

□ **Thanks/conclusion**

Conclude your proposal with a brief summary of everything you outlined in your proposal, and most importantly, thank the prospect for their consideration of your business.