**Prepared for:**

[Client First Name] [Client Last Name]

**Created by:**

[Sender Company]

[Sender First Name] [Sender Last Name]

# Introduction

Your business' software is essential to its long-term success and profitability. A well-designed tech stack is important not only for running day-to-day tasks, but also for driving efficiency, generating insights, and gaining a competitive advantage.

At [Sender Company], we work with our clients to implement cutting-edge solutions that generate clear returns. We appreciate your interest in working with us. In this proposal, you'll learn about the precise ways in which we can help your business.

# Executive Summary

We understand that [Client Company]'s main goal is to [main client goal].

We propose that the following software solution will enable [Client Company] to achieve its desired outcomes in this area while effectively navigating market risks and challenges: [software type].

The ongoing cost of this software is [total monthly cost] per month. The approximate installation fee amounts to [installation fee].

The point of contact for this project is [Sender First Name] [Sender Last Name], available at [Sender Email].

# About Us

At [Sender Company], we have over [number of years] years of experience in the SaaS industry – experience that enables us to find innovative solutions to our clients’ needs and help them close deals more effectively.

### What You Need

Regardless of whether you’re using managed services, relying on others or transitioning infrastructure [Sender Company] can help you.

​We offer service solutions and more, along with round-the-clock support for any questions you may have.

### How We Deliver

We have assembled a team of professionals who are experts in their fields to identify client needs and formulate effective solutions via our software services.

Our reliable, efficient service is why we’ve been trusted by over number of clients to help them operate and grow successfully.

Our team is always on hand to help with anything you need regarding our service.

# Project Overview and Services Proposal

This project overview covers the proposed deliverables and workflow in relation to your specific project.

If you or any other decision-makers have additional questions or require extra documents - such as a more detailed executive summary, cover letter, or more detailed design proposal - please don't hesitate to contact us using the information below.

### Client Goals

The proposed software-as-a-service (SaaS) solution will enable the client to meet the following goals: [list client goals and needs].

### Solution Outline

We will provide the following software type to [Client Company]: [software type].

This software package includes the following features that are of particular relevance to [Client Company]:

* [Feature One]
* [Feature Two]
* [Feature Three]

We can also offer additional onboarding, training, and maintenance services. Ongoing consultation is available.

### Execution Timeline

The execution timeline will be as follows:

* Phase One: Software Implementation Completed by dd-mm-yy.
* Phase Two: Onboarding and Training Completed by dd-mm-yy.
* Phase Three: Troubleshooting and Adjustments Completed by dd-mm-yy.

### Technical Requirements and SaaS Model

The client will require the following technical infrastructure and in-house expertise to run the software: [applicable supporting technical infrastructure].

Where such technical and infrastructure is lacking, [Sender Company] will work with [Client Company] to implement a viable solution and automate existing processes.

### Industry and Market Challenges and Risks

We believe that our solution will help [Client Company] overcome the following obstacles and risks: [market challenges and risks].

Budgetary Requirements

Pricing, ongoing maintenance, follow-up, and consulting fees are outlined in the "Pricing Plan" below.

### Software and Hardware Requirements

Use of the proposed software-as-a-service package requires the following software, hardware, CRM, and automation frameworks: [hardware and software requirements].

### Project Lead and Point of Contact

The point of contact for this project is [Sender First Name] [Sender Last Name]:

**Phone number:** [Sender Phone]

**Email Address:** [Sender Email]

You may also wish to contact the lead salesperson with questions about the sales process at [email address of salesperson].

# Our Team

|  |  |
| --- | --- |
|  |  |
| Name Position  BIO | Name Position  BIO |

# Case Studies and Testimonials

"Use this area to showcase an original client testimonial, preferably in a similar vertical to the recipient of this proposal." ~ Client One, Company One

"Use this area to showcase an original client testimonial, preferably in a similar vertical to the recipient of this proposal." ~ Client Two, Company Two

"Use this area to showcase an original client testimonial, preferably in a similar vertical to the recipient of this proposal." ~ Client Three, Company Three

# Pricing Plan and Project Costs

We offer a range of flexible pricing options to match the diverse needs of our clients. Choose whichever plan and payment method (debit card, credit card, PayPal transfer etc.) best suits your business:

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Price | QTY | Subtotal |

|  |  |
| --- | --- |
| Subtotal | **$0.00** |
| Discount | **$0.00** |
| Tax | **$0.00** |
| **Total** | **$0.00** |

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# Terms of Agreement

[Sender First Name] [Sender Last Name] of [Sender Company] and [Signer First Name] [Signer Last Name] of [Signer Company] agrees to enter a mutual business agreement.

The terms of this agreement are as follows:

1. All confidential and proprietary information disclosed by one party to the other will be marked clearly as such.
2. Both parties agree not to use such information for any purpose other than to fulfill this agreement. Each party will not disclose the information to any third party, and only disclose it to its employees or affiliates who have a need to know and agree to uphold the confidentiality of it. Each party agrees to protect the confidentiality of, and undertake any reasonable actions to prevent unauthorized use or disclosure of, the confidential information to stop it becoming public knowledge or available to any parties not legally bound to uphold its confidentiality, provided that such party’s obligations never exceed the reasonable level of care used to protect its own similarly important confidential information. Each party will notify the other party in writing in case of any misuse or misappropriation of such confidential information, and give assistance to the injured party regarding any related legal proceedings. Each party accepts that its obligations stated here will remain in effect, notwithstanding termination of the business relationship, for a term of two years after the final disclosure by the other party of confidential information.
3. Confidential information will not be copied unless to fulfill the obligations of this agreement. Any tangible items containing or relating to the confidential information of either party that is in the possession of the other party will remain the property of the original party to disclose the confidential information and will be returned to that party promptly upon their request. Nothing in this agreement will be interpreted as granting rights, by license or otherwise, to any confidential agreement unless specified by this agreement.
4. The obligations of each party under this agreement will not apply to any information that is:
5. already known by the receiving party or in the public domain when disclosed;
6. made publicly available following disclosure by the disclosing party through no action of either party;
7. furnished rightfully by a third party to the receiving party without any limits on disclosure or use;
8. disclosed with written prior consent from the disclosing party;
9. independently developed by the receiving party;
10. disclosed as required by any legal proceeding, provided that the disclosing party is notified promptly of such action by the receiving party, with opportunity given for the disclosing party to seek legal resolutions to maintain the confidentiality of such information.
11. No contents of this agreement will oblige either party to disclose any information to enter another agreement with a different party or disclose any information to the other party. Each party accepts that in the case of the other party bringing any enforcement to protect the agreement, the damages will be difficult to gauge and irreparable, and the other party will be entitled to equitable relief, which will include a preliminary injunction and any other available relief. If any litigation is raised in relation to this agreement, the winning party will be entitled to any associated legal costs and any other awarded relief.
12. This agreement is governed by [Applicable Law], without regard to any provisions relating to conflicting laws. This agreement, along with any attached exhibits, make up the entirety of this agreement between the two parties and take precedence over any existing agreements or communication, spoken or written, between each party relating to the subject matter of this agreement. The waiver of any failures to comply with this agreement will in no way limit, waive or affect either party’s right to enforce compliance with this agreement thereafter. Any modifications to this agreement must be notified in writing and signed by both parties in order to come into effect. Any benefits and obligations determined by this agreement will be binding to and inure to the benefit of the partied and their respective assigns, successors, and representatives.

# Signature

I, [Signer FirstName] [Signer Last Name], of [Signer Company] agree to the terms and pricing set out in this proposal by [Sender Company]:

**Signature:**