**Heads Up Adviser**

Proposal to Provide XYZ Services

Prepared for: Client ABC

Prepared by: John Smith, CEO

Date: 25 December 2019

# Overview and Goals

Dear [Client Name],

[Open this paragraph with an overview of why it’s important for your client to use your agency as a tool for success. Running a business is hard, and being an entrepreneur comes with its fair share of challenges, so use this section to explain how you as a partner will be able to alleviate the pressures and challenges that come with entrepreneurship through your services]

During our sessions, we will discover: [Insert 4-5 bullet points of what your proposed service will accomplish]

* [Bullet Point 1]
* [Bullet Point 2]
* [Bullet Point 3]
* [Bullet Point 4]
* [Bullet Point 5]

These are the key things that we will focus on and ensure [Goal of proposed services].

We are excited for the opportunity to work with you, and we look forward to your success.

Sincerely,

[Your Signature]

[Your Name]

[Your Title] [Your Company]

# Scope of Work

## [Title of Proposed Service]

[Use this initial sentence to lead in to the three biggest ways in which your proposed service or services will impact your client’s business]

* [Impact 1]
* [Impact 2]
* [Impact 3]

[Include a few sentences here outlining your company’s philosophy for achieving success in this particular area]

In this [Proposed Service], we will provide a comprehensive plan which includes:

* [Action Item #1 with comprehensive description]
* [Action Item #2 with comprehensive description]
* [Action Item #3 with comprehensive description]
* [Action Item #4 with comprehensive description]
* [Action Item #5 with comprehensive description]

Upon completion of this comprehensive plan, we will review the recommendations made and prioritize any outstanding tasks or deliverables that need to be completed prior

to moving to the next phases which will include [next steps in completing your proposed services].

## Accountability & Execution Plan

Throughout [Proposed Service], we will be providing recommendations, but what good are recommendations if we don’t prioritize or execute? Before we proceed with [Proposed Service], we will identify mission critical tasks, assign ownership, and create due dates for the tasks so that they are complete. As we build this out, more ideas, tasks, etc. may come up. We have a system to make sure that these ideas are documented and noted so that we can stay on task, but we will revisit these action items as others are completed.

Also note that while we are working through these phases, it is imperative that we get feedback from your team in a timely fashion so that we can keep things moving forward.

# Timeframe

To complete the work outlined in the project scope, we’ll need approximately [Estimated Timeframe] from beginning to end, depending on when we receive feedback at each milestone. Upon signing the proposal we are prepared to start work immediately.

|  |  |
| --- | --- |
| **PHASE** | **DAYS** |
| Phase ABC | 12 |
| Phase ABC | 20 |
| Phase ABC | 42 |
| Phase ABC | 31 |

# Your Investment

Below is the budget we’ve estimated based on the scope of services outlined earlier in this proposal. If you have any questions about our pricing or need to increase or decrease the scope of work, please leave a comment and let us know.

|  |  |  |  |
| --- | --- | --- | --- |
| **DESCRIPTION** | **RATE** | **QTY** | **PRICE** |
| Item ABC | 2,000 | 2 | 4,000 |
| Item DEF | 1,000 | 1 | 1,000 |
| Item GHI | 500 | 10 | 5,000 |
| TOTAL COST | $10,000 |

# Why Partner With Us



[Use this section to explain what separates you as a company and how you take action to accomplish this]

# Terms

Date: [Date Submitted]

Between “us”, [Your Company], and “you”, [Client’s Company]

You, [Client’s Company], are hiring [Your Company] located at [Your Address] to perform consulting and coaching services for the estimated total price of [Cost of Services] as outlined above in our fee schedule.

[Place your company’s terms and conditions here]

# Next Steps

1. Please read the contract on the previous page to make sure you understand all the details involved with us working together. It’s really important to us that everything is transparent and understood from the beginning so that we lay a solid foundation for a great working relationship.
2. If you have any questions at all, please let us know.
3. Once you feel confident about everything and are ready to move forward, please sign below.
4. Once we receive notification of your acceptance, we’ll contact you shortly to sort out next steps and get the project started.
5. We’ll email you a separate copy of the signed contract for your records.
6. If you’d like to speak to us by phone, don’t hesitate to call [Your Phone Number].

**Acknowledgment:**

|  |  |  |
| --- | --- | --- |
| **Your Name**Your Company |  | **Client Name**Client Company |
|  |  |  |
| Date Signed |  | Date Signed |