

Proposal & Quote Template Structure

The sections a winning proposal needs, so quotes don't vary wildly rep to rep.

1. Summary

One paragraph restating their problem and what you're proposing, in their language.

2. Scope Of Work

Specifically what's included. Be as concrete as possible.

3. Timeline

Key milestones or delivery dates, not just a single end date.

4. Investment

Clear pricing, broken down enough to be understandable.

5. What's Not Included

Just as important as what is; prevents scope creep later.

6. Why Us

Brief, specific proof: a relevant result, a real differentiator, not a generic capabilities list.

7. Next Steps

Exactly what happens if they say yes.

Consistency Checklist

- ☐ Same structure used by every rep, so nothing gets missed
- ☐ Pricing calculated the same way every time, not ad hoc
- ☐ Proposal reviewed before sending on anything above a set deal size