

# Proposal Template

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- 1 Cover Page** Create a title focused on the desired business result. Remember to list all those you are presenting to and include your name, job title, contact information, and the date.

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  - 2 Desired Business Result** State clearly and succinctly the desired business result you and the prospect/customer have agreed to focus on.

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  - 3 Measures of Success** List the ways you and the prospect/customer have agreed you will measure success (we recommend 2-4 as a best practice).

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  - 4 Tailored Solution** Present the solution in the context of how it will influence the consumer journey. Other recommendations that are not included in your solution, but will benefit the customer, and increase the chances of success are added here. MINI-CLOSE 1

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  - 5 Critical Path** This closing and confidence building mechanism is simply a list of all both parties have invested to this point and evidence that you are thinking of the fulfillment plan going forward. MINI-CLOSE 2

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  - 6 Commitment** The sign-off page to ensure both parties are committed and that they feel the commitment of the other party. Use an expiration date to create urgency. Include language that communicates what it will be like doing business with you. MINI-CLOSE 3

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  - 7 Appendix** If you include all the sections above and in our recommended order, you will present the right information in the right order, without getting in the weeds—making it easier for the perspective buyer to follow. That’s why you want all the supporting details in the appendix.

## Mini-Closes are:

- #1: Are we in agreement on how we will measure the success of this campaign?
- #2: Do you have a high degree of confidence that this solution will deliver the results we are focused on?
- #3: If we are both ready to commit to this plan today, we can keep the momentum going and start working on implementation. Are you ready to proceed?