

# PROPOSAL TEMPLATE

Proposal for {Prospect Company Name}

Date: MM/DD/YYYY

## RECAP

This is where you summarize what you heard the prospect tell you about their situation.

## PROPOSAL

This is where you tell them your plan for helping them resolve their issue. You are responding to what they told you in the meeting. Your proposal must speak to their needs and wants in order to be effective.

## DETAILS

Date:

Location:

Frequency

Financial Investment

Duration

Reporting

\*Proposal expires 30 days from issuance