

PRICING PROPOSAL

[Project or Engagement Title]

Prepared for: *[Prospect Company Name]*

Prepared by: *[Your Company Name]*

Date: *[Date]*

Valid until: *[Date — typically 30 days from issue]*

Account Executive: *[Name, Email, Phone]*

01 WHAT WE ARE BUILDING TOGETHER

Keep this to 3–4 sentences. Restate the buyer's goal in their language and connect the investment below to a specific outcome.

Based on our conversations with *[Prospect Company]*, we understand that your priority is *[goal 1]* and *[goal 2]* by *[timeframe]*. The investment outlined in this proposal is designed to deliver *[specific outcome]* while *[secondary benefit]*. We have structured the pricing to *[explain any customization for their situation]*.

02 RECOMMENDED PLAN

Plan Details	
Plan / Tier	[Tier Name]
Best for	[1-line description of who this is right for]
Contract term	[12 months / 24 months / month-to-month]
Billing	[Annual / Quarterly / Monthly]
Users included	[Number or Unlimited]
Onboarding included	[Yes / No / Optional add-on]
Support tier	[Standard / Priority / Dedicated CSM]

Why we recommend this plan for [Prospect Company]:
[2–3 sentences connecting this specific tier to their stated requirements, team size, use case, or goals. Do not leave this section blank. Generic copy defeats the purpose of a proposal.]

03 INVESTMENT SUMMARY

Item	Description	Qty / Unit	Unit Price	Total
[Core product / license]	[Brief description]	[Seats / month / project]	[\$X]	[\$X]
[Implementation / Setup]	[Brief description]	[One-time]	[\$X]	[\$X]
[Add-on or module 1]	[Brief description]	[Unit]	[\$X]	[\$X]
[Add-on or module 2]	[Brief description]	[Unit]	[\$X]	[\$X]
[Support or success tier]	[Brief description]	[Monthly / included]	[\$X]	[\$X]
Year 1 Total			Monthly:	

Payment terms: [Net 30 / upfront annual / quarterly installments]
Renewal terms: [Auto-renews at then-current pricing unless cancelled 30 days before term end]
Volume pricing available for additional seats or multi-year commitments.

04 WHAT THIS INVESTMENT DELIVERS

Line Item	What You Get	Business Impact
[Core product]	[Key capability 1, Key capability 2, Key capability 3]	[Outcome: e.g. Reduces rep search time by 8 hrs/week]
[Implementation]	[Dedicated onboarding, data migration, team training]	[Faster time to value, lower internal resource cost]
[Add-on 1]	[Capability]	[Outcome]
[Support tier]	[SLA / response time / named CSM]	[Reduced downtime, faster issue resolution]

ROI / Payback period (optional but recommended)

[Based on [X] reps saving [Y] hours per week at an estimated cost of \$[Z]/hr, this investment pays back in approximately [N] months.]

05 **TIMELINE AND NEXT STEPS**

Step	Owner	Target Date
Proposal review and questions	<i>[Prospect]</i>	<i>[Date]</i>
Stakeholder alignment call	<i>[Both teams]</i>	<i>[Date]</i>
Legal and procurement review	<i>[Prospect]</i>	<i>[Date]</i>
Contract signature	<i>[Both parties]</i>	<i>[Date]</i>
Kickoff and onboarding begins	<i>[Your team]</i>	<i>[Date]</i>

To move forward: *[Specific ask — e.g. Reply to this proposal with any questions, or click the button below to accept the terms and kick off onboarding.]*

06 FREQUENTLY ASKED QUESTIONS

Can we start with fewer seats and expand later?

Yes. Our agreements are designed to scale. You can add seats at any time at the per-seat rate in your contract. There is no minimum expansion threshold.

What happens at renewal?

Your contract auto-renews at the rates in your agreement unless you notify us 30 days before the renewal date. Multi-year agreements lock in your current pricing.

Is there a free trial?

[Customize: Yes, we offer a [X]-day trial for up to [N] users. / We offer a paid pilot at a reduced rate for the first 60 days.]

What does onboarding include?

[Customize: Onboarding includes [N] implementation sessions, data migration support, and a dedicated training call for your team.]

What is your cancellation policy?

[Customize based on your terms.]

Ready to move forward?

[One sentence — what should they do next? Reply, sign, book a call.]

Questions? Contact your account executive: *[Name | email@yourcompany.com | +1 000 000 0000]*