**Microsoft Word Basic Consulting
Proposal Template Example**

Client Information

|  |  |
| --- | --- |
| Name | Alex Johnson |
| Company | Tech Innovations, Inc. |
| Role | Director of Operations |
| Address Line 1 | 234 Innovation Drive, Suite 567 |
| Address Line 2 | Tech City, TX 78901 |
| Phone | (555) 123-4567 |
| Email | Email address |

**Greeting**

Dear Alex,

Thank you for the opportunity to consult with Tech Innovations, Inc. on the Digital Transformation Project.

Future Vision Consulting has delivered tailored, innovative solutions to drive exceptional results for over 15 years. We’ve collaborated on similar ventures with leading technology firms in the past, and we’re eager to bring our experience and enthusiasm to your project.

**Project Overview**

|  |
| --- |
| Tech Innovations, Inc. faces significant challenges due to outdated legacy systems which are hindering operational efficiency and affecting overall performance. Future Vision Consulting proposes a comprehensive digital transformation project that involves implementing a modern ERP system designed to streamline internal processes and improve data management. The goal is to boost operational efficiency by 30%. |

**Challenge(s) and Proposed Solutions**

|  |  |
| --- | --- |
| Challenge: Outdated legacy systems | Solution: Implementing modern ERP system to streamline processes and improve data management |

**Project Objectives**

|  |  |
| --- | --- |
| Objective 1 | Increase operational efficiency by 30% through implementation of new ERP system |

**Approach**

|  |
| --- |
| Our approach begins with an initial assessment to evaluate Tech Innovations, Inc.’s current systems and processes. This will help us identify specific needs and areas for improvement. Based on our findings, we will design a detailed implementation plan for the ERP system, ensuring that our solutions align with your operational goals. The next phase involves system deployment and configuration. Finally, we will provide comprehensive training sessions and user manuals for your staff to ensure a smooth transition and successful adoption of the new system. |

**Deliverables**

|  |
| --- |
| Deliverable 1 |
| Comprehensive needs assessment report |
| Deliverable 2 |
| Detailed implementation plan for ERP system |
| Deliverable 3 |
| Deployed and configured ERP system |
| Deliverable 4 |
| Training sessions and user manuals for staff |

**Schedule and Timeline**

|  |  |  |  |
| --- | --- | --- | --- |
| Deliverable | Person Responsible | Start Date | End Date |
| Needs Assessment Report | Mary Johnson | MM/DD/YY | MM/DD/YY |
| Implementation Plan | John Smith | MM/DD/YY | MM/DD/YY |
| ERP Systems Deployment | Emily Brown | MM/DD/YY | MM/DD/YY |
| Training Sessions and Manuals | Michael Lee | MM/DD/YY | MM/DD/YY |

**Team Experience and Qualifications**

|  |  |  |  |
| --- | --- | --- | --- |
| Team Members | Experience | Responsibilities | End Date |
| Mary Johnson, Senior Consultant | 10 years of experience in digital transformation systems integration |  |  |
| John Smith, Project Manager | 12 years of experience managing large-scale IT projects |  |  |
| Emily Brown, Technical Specialist | 8 years of experience in ERP system deployment |  |  |
| Michael Lee, Assistant Technical Specialist | 6 years of experience building ERP system training sessions and writing user manuals |  |  |

**Cost and Payment Terms**

|  |  |  |  |
| --- | --- | --- | --- |
| Activity | Rate | Hours | Price |
| Report | $150/hour | 60 | $9,000 |
| Plan | $150/hour | 120 | $18,000 |
| Deployment | $200/hour | 120 | $24,000 |
| Training and Manuals | $100/hour | 120 | $12,000 |
| **Total** | **$63,000** |

Consultant Contact Information

|  |  |
| --- | --- |
| Name | Lisa Green |
| Company  | Future Vision Consulting |
| Role | Program Manager |
| Address Line 1 | 789 Business Avenue, Suite 101 |
| Address Line 2 | Innovation City, TX 45678 |
| Phone | (555) 987-6543 |
| Email | Email address |

Signatures

|  |  |
| --- | --- |
| Name |  |
| Title  |  |
| Date | MM/DD/YY |

|  |  |
| --- | --- |
| Name |  |
| Title  |  |
| Date | MM/DD/YY |

|  |
| --- |
| **DISCLAIMER**Any articles, templates, or information provided by Smartsheet on the website are for reference only. While we strive to keep the information up to date and correct, we make no representations or warranties of any kind, express or implied, about the completeness, accuracy, reliability, suitability, or availability with respect to the website or the information, articles, templates, or related graphics contained on the website. Any reliance you place on such information is therefore strictly at your own risk. |