

PROJECT MANAGEMENT DOCS

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PROPOSAL TEMPLATE

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PROPOSAL TEMPLATE
<PROJECT NAME>

COMPANY NAME
STREET ADDRESS
CITY, STATE ZIP CODE

DATE

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1. INTRODUCTION

In business it is common for companies to seek cheaper or more efficient ways to get things done. One method companies use to do this is by outsourcing work to other companies who provide services or expertise in a particular area. This is a common practice in the completion of projects as it provides a cost-effective alternative to a company hiring additional employees permanently to fill temporary or niche roles. It is common for a company to send out requests for proposals (RFPs) for other organizations to respond to in the form of a proposal. Proposals may take many different formats and this template simply provides one example of a proposal template. This section should provide a description of the services being sought in the RFP and why your organization believes it should be selected.

Archway Consulting seeks a service provider to design, test, implement, and manage an integrated payroll solution and provide training to human resources (HR) staff on the use and functionality of the solution. Archway Consulting currently maintains a limited HR staff and does not have internal information technology (IT) or payroll software expertise. Current payroll infrastructure is outdated and the ability to upgrade the existing infrastructure does not exist. Archway Consulting expects that by upgrading to a new and robust payroll system with outsourced management, they will experience fewer payroll issues, accomplish payroll and accounting tasks in less time, and realize a long-term cost savings across their HR department.

ProPayroll Services understands the problems caused by inefficient and outdated payroll systems and believes it can provide Archway Consulting with the most cost-effective solution. Our payroll solutions provide efficient and upgradable platforms which are easy to use, manage, and modify. Once the solution is implemented, our clients have access to 24-hour support throughout the life of the service. Our team of experts is always on hand to assist our clients and we pride ourselves on the exception customer support that we offer. ProPayroll is confident that it can provide Archway Consulting with a superior payroll solution and support in order to meet its long-term goals.

2. CLIENT OPERATIONS

This section describes the potential client's organization and operations as you understand it. This may include a description of how the products or services they are seeking affect their current operations. While it is not necessary to provide excessive detail, there should be enough information to convey a thorough understanding of the client's organization and how their operations are currently impacted.

Archway Consulting is a small consulting business located in the Northern Virginia area. The company was founded in 1990 with a staff of 3 and has grown to over 120 full time employees (FTEs). The primary focus is working with Department of Defense organizations and providing project management consulting services. Current HR staff consists of 6 FTEs and 3 of these conduct payroll and accounting operations. Because of the limited staff and outdated payroll/accounting system, Archway Consulting is experiencing a backlog of

accounts receivable, inventory/accounting reconciliations, data entry and records, and the company frequently experiences issues with employee pay.

ProPayroll's proposed solution will provide these services and resolve the issues that Archway Consulting is currently experiencing. Additionally, by utilizing the ProPayroll solution, Archway's HR FTEs can re-focus on recruiting, employee records management, and other HR operations in order to support the company's operations and improve performance.

3. EXECUTIVE SUMMARY

This section describes the goals and solution that the organization is proposing to the potential client. The goals should be based on how the organization will help the potential client achieve its desired outcome. This section should also include a description of the solution and how it will provide the client with the service they are seeking. You may also choose to include other information in the executive summary such as what your service provides that others do not or a list of benefits for choosing your solution/service.

ProPayroll Services helps its clients achieve success by establishing goals and a comprehensive solution based on our clients' needs. Our goals reinforce the commitment we have to our clients:

- 1) Provide leading edge payroll solutions which are cost-effective, flexible, and technologically advanced
- 2) Guarantee on-time payroll, accounting, and tax distribution and reporting
- 3) Guarantee 24 hour coverage and support for our clients and superior customer service

ProPayroll's proposed solution allows us to meet these goals as well as those of Archway Consulting. ProPayroll uses a phased approach to determining the best solution for our clients. Additionally, all ProPayroll employees maintain certifications in appropriate professional organizations and industry fields. All ProPayroll accountants are certified public accountants (CPAs). All payroll managers are certified payroll management program (CPMP) certified. ProPayroll also maintains a staff of tax attorneys for auditing and oversight purposes.

Phase I: Initial Consultation

During this phase our team of experts will review current payroll and accounting systems and practices in order to determine pain points and leverage our expertise to develop a more detailed list of options for the client.

Phase II: Solution Design

Our experts will work with the client to design the solution based on the needs of the company. This tailored approach allows ProPayroll to ensure the client gets the solution they need and does not have to pay for excess services which they will not use.

Phase III: Implementation

Our team will implement the solution in a seamless manner that will be transparent to daily operations. This phase also marks the beginning of ProPayroll's management of client payroll and accounting operations and the completion of the solution project as we enter the operations and management stage.

Phase IV: Management and Support

This is the final phase and ongoing through the life of the service. ProPayroll will manage all payroll and accounting functions based on the accepted solution. Services and functionality include:

- Monthly, quarterly, and annual tax statements and payment records
- Account/payroll balancing and reconciliation
- Withholding management
- Benefits and benefit summaries
- Accounts payable
- All payroll and accounting distribution and management
- Inventory account balancing
- Cash on hand

Benefits for choosing ProPayroll for your payroll solution include:

- Reduced monthly costs for payroll and accounting activities
- Latest technology and upgradable solutions
- Professional staff providing superior customer service and support
- Flexibility to adapt solution to business environment, operations, and growth
- No cost for initial consultation and recommendations
- Our solution will allow your HR staff to focus on improving your business operations
- All ProPayroll staff is fully certified and accredited in appropriate professions

4. COST SUMMARY

This section should describe the costs associated with the proposed solution. There are often situations where your company does not have all of the information needed to develop and provide a very detailed cost summary. However, all efforts must be taken to describe what the costs include or do not include and it must be clear to the potential client that this is an estimate only. More detailed cost estimates may be provided if the proposal is accepted and your company works closely with the client to determine more detailed requirements. The cost summary is usually used by the client as a basis of comparison between your company and other proposals.

The following cost summary has been developed as an estimate of the costs associated with the proposed solution. These costs are an estimate only. Based on acceptance of this proposal, our team will work with you to develop a detailed list of requirements, develop your tailored solution, and provide a more focused and applicable cost estimate.

Phase I: Initial Consultation

One Time

Monthly Cost

- Conduct meetings with Archway Consulting HR staff	No Cost	No Cost
- Determine gaps, application needs, recommendations	No Cost	No Cost

Phase II: Solution Design

- Develop application based on client requirements	\$130,000	None
- Conduct Beta testing and application revisions	\$125,000	None
- Finalize solution and provide client tech. data package	\$ 25,000	None

Phase III: Implementation

- Load application on Archway Consulting Infrastructure	\$145,000	None
- Establish Archway Consulting in Data Center	\$200,000	None
- Training for Archway Consulting HR	\$ 15,000	None
- Handoff to Operations/Project Close Out	\$ 12,000	None

Phase IV: Management and Support

- Data Hosting Fees for Data Center	None	\$ 4,000
- Client Technical Support	None	\$ 3,000
- Monthly Payroll Management	None	\$ 8,000

Totals	\$652,000	\$15,000
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5. TERMS AND CONDITIONS

There are many terms and conditions which must be agreed to before a contract is awarded. Some may be provided by the client and others may be suggested by the bidder. Any terms which the proposing company requires should be stated in the proposal. The company should also maintain a certain level of flexibility throughout the proposal process as the client may be discouraged by a proposal with too many terms and/or conditions.

ProPayroll requires 50% of up front costs be paid immediately upon award of the contract. Remaining 50% may be paid upon project close out and beginning of management and operations of the payroll solution.

All monthly fees are due on the first business day of each month.

Any additional work required by the client outside of the scope of the contract will be billed separately and will be charged at 50% immediately upon award of the contract and 50% upon acceptance of the deliverable(s).

The minimum term for this contract is 12 months from the time of project closeout and beginning of management and operations of the payroll solution. Any monthly rate increases for the follow on term will be provided to Archway Consulting no later than 30 calendar days from the end of the initial 12 month term.

If contract cancellation is required 90 days of notice must be given by either party. If the contract is cancelled prior to the completion of the initial term, payment must be made for all

services provided including full payment until the end of the contract term or 90 days, whichever is longer.

Late payment fees will be assessed after 30 days.

Final terms and conditions will be provided in final contract.

6. CONTACT

This section provides the contact information for the organization submitting the proposal. In case the potential client has questions or needs additional information, they must have a point of contact who can address their questions or provide this information. This is often a project manager or account manager.

ProPayroll is here to serve you. Please feel free to contact the account manager we have assigned for Archway Consulting at any time if you have any questions or require additional information.

ProPayroll Services

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