

Project:

A long form blog post, 2000 to 2500 words that gives best practices and strategies for writing a business proposal to increase conversions and gain new clients for service-based businesses. Present the B12 platform as the ideal solution for business owners because of the tools it provides.

How to develop a business proposal format that wins clients

Your business proposal is an introduction to your company, the service you provide, and a roadmap for the experience your clients will have when they hire you. The business proposal format you use has considerable influence on whether potential clients choose your company over your competition.

The document should be intuitive, informative, and engaging. Few companies develop the perfect business proposal format as soon as they launch. But with experience and a suite of professional tools to complement your proposal, you can increase the number of prospects you convert and start booking more high-value clients.

People often confuse proposals with estimates, quotes, and business plans. They're unique in that they aim to convince your ideal prospects to hire your company.

- **Estimates:** an abridged version of a proposal that focuses on cost and deliverables. They're for existing clients and smaller projects where detail isn't necessary.
- **Quotes:** fixed prices for deliverable services, influenced by fluctuating material costs, so they're often only valid for a limited time.
- **Business plans:** outlines your business structure, goals, and operations. They're presented to investors and banks to secure financing.

A business proposal is for prospects who are interested in hiring you. They contain:

- **Context:** your company's background, experience, and previous work.
- **Testimonials:** build trust with the client by sharing the experiences of prior clients.
- **Solution:** how your service will help their problem and the value your company brings.
- **Costs:** detailed breakdowns of materials, labor, consumables, etc.
- **Timeline:** proposed schedule for start date, milestones, and deliverables.

With so much in-depth detail, a streamlined business proposal format is essential for sharing critical information in an engaging way.

Why do you need a business proposal?

You may wonder if you need to spend time on a business proposal format when an estimate gives the information clients care about: *the cost*. But a proposal can do more than explain how

much a service costs. It can persuade potential clients that your service is worth the expense, helping you convert more prospects at a higher price point.

A business proposal can also introduce the experience clients will have when working with your company to avoid miscommunication and churn later. You'll reduce "sticker shock" for high-value services by communicating value to clients with outlined deliverables, previous client testimonials, and your expertise.

Win more business with a great business proposal format by letting prospects know why your company is better than the competition. Use your proposal to explain why your services are worth the cost.

Maybe you've struggled to land clients after sending an estimate. Consider developing your business proposal format and complementing it with a professional website and onboarding system.

Every business proposal format needs these essential components

Your business proposal should feel personalized and unique to your brand. However, every format needs to have the same essential structural components to get across information that clients need.

Title

Your title should describe what the business proposal contains. Include the client's name, the service you will provide, and the date. A detailed proposal will help both you and the prospect stay organized. An eye-catching title page also communicates professionalism, reinforces brand recognition, and sets the expectation that the client will receive high-value service.

Table of contents

Make it easy for your client to find the information they want in your proposal. The table of contents also works as an outline, letting your client know what the proposal contains. Use your discretion when deciding to put a table of contents into your business proposal format. For shorter proposals of a few pages or less, devoting an entire page to this section isn't necessary — use bullet points or a call-out box instead.

Overview

The overview is the five-minute elevator pitch describing the client's pain points and the solution you will provide. It should contain persuasive language that makes the services you're

providing, and their value, clear to the prospect. Begin with a brief introduction thanking the client for the opportunity to work with them in a way that communicates your professionalism, enthusiasm, and expertise.

Deliverables and timeline

In this section, go over the services you will provide and milestone dates for deliverables in as much detail as possible. Think of the timeline as an opportunity to address future client concerns and prevent miscommunication in the future. It's the ideal place to:

- *Highlight* points at which client input is necessary for the project to proceed.
- *Set expectations* for your level of communication through the project, and methods you'll be using, whether email, phone calls, or video conference.
- *Articulate* the number of revisions you'll be doing and how to submit feedback, i.e. email, annotated drafts, etc.

A precise timeline builds confidence with the prospect, giving them a date to expect the completed work and a clear picture of the process.

Team members

Introduce yourself and your team members so prospects can get to know your company. Highlight your experience and tell the story of your brand to give clients a chance to make an emotional connection with your company. By sharing a little about yourself and the people working on their project, you build trust and confidence.

Terms and conditions

Go over the fine details about your services to prevent churn further into the project. This section is an excellent place to highlight acceptable notes for revision or areas for input from the client. Make clear how many drafts of the project you'll do, the success metrics you'll be using for the project, and exclusions from your range of services.

Try to keep this section as brief as possible. While great for preventing miscommunication, a lengthy terms and conditions section may also drive away prospects in favor of a company that they perceive as easier to work with.

Conclusion

Reinforce the most crucial point that you want the prospect to take away from the business proposal. In this section, articulate how you will resolve the client's pain points, the expected results from your service, and any follow-up support you'll provide.

Stress the main takeaways and the next steps the client should take if they want to accept the proposal. Always present a simple path for working with your brand, and give a set date where you'll follow up with the prospect, such as two or three days after receipt of the proposal.

Best practices to create a professional business proposal

Generating a business proposal happens in two stages—first, the business proposal format, which will be your template in the future. Download a free document or hire a professional designer to help set up an easy-to-use template that reinforces your branding, is eye catching, and easy to follow. Use call-out boxes, graphs, charts, and imagery to break up large blocks of text that prospects may skim over.

Continue developing and updating your proposal as you receive feedback and expand or refine your range of services and workflow.

Second, tailor every proposal for a specific prospect. Unfortunately, there's no one-size-fits-all for service-based businesses. If you have stock services, you can send a quote for those instead of a complete business proposal.

Otherwise, take time to research the prospect and craft a proposal specific to their project and pain points. Use persuasive language through all sections of the proposal, but keep the text concise and direct.

Finding resources to craft a business proposal

Luckily, you don't have to go into developing your own business proposal format blind. There are many resources available (most for free) to help you develop and then hone a business proposal.

They range from practical advice for formatting, tone, and structure to downloadable templates where you can edit colors and simply click and fill-in each section.

- **JotForm** provides [business proposal templates](#) by industry, such as consulting, research, or interior design, with customizable colors.
- **HubSpot's** [business template](#) provides prompts at every section if you suffer from writer's block or need help to get started.
- **FormSwift** makes [drafting your business proposal](#) easy with simple fill-in-the-black responses to generate a document.

You can lose hours sifting through the resources available online, trying to find one that works for your brand. If that's the case, you may opt for hiring a freelance designer to help you develop a personal business proposal template that reflects your branding. Once you have the content, a template designed by a professional will reinforce your value for prospects reviewing the document.

How to follow up on a proposal you've sent

In an ideal world, you'd send the proposal and receive an immediate response with the prospect signing a contract and paying a deposit for your services. In the real world, you'll send the proposal and hear nothing in response for a few days. The key is not to give up but learn how to send effective follow-up emails.

1. **Clear, eye-catching subject line:** we all get far too many emails in a day. Make sure your email won't get missed with a clear, direct subject line.
2. **The shorter, the better:** try to get your point across in just a few lines, so they don't skim and don't give up on reading it.
3. **Reminder:** summarize why you're emailing in a single sentence, and reiterate the value of your service and the pain points you can solve for the prospect.
4. **Clarify:** ask why they haven't responded. If they're busy, your course of action differs from if they've gone with another proposal.
5. **Call to action:** ask them to call, email you back, or link to an onboarding form on your website, but give a direct call to action for them to follow.
6. **Attachments:** reattach your proposal in case it got lost in the shuffle.

Don't send just a single email to follow up; people are busy, and you never know what may have come up in their personal or work life.

Set a reminder on your calendar to check in with the client **three days** after submitting the proposal. Then again, **three days** after the first reminder. A third reminder **one week** after the second. **One week** after the third reminder, let the prospect know you're closing their file.

Finally, check-in again in **six months**. They may have been in the middle of the busy season, swamped with other projects, or unsure if they were ready for your service and might be thrilled to hear from you.

Essential tools you need to support your business proposal template

A business proposal template is just one part of the experience you present to prospects. When your online presence is professional, cohesive, and clear, you build brand awareness and confidence. No matter the expertise and skill of your business, you can't compete if you're not presenting yourself with high-value branding and a suite of professional services.

B12 provides everything you need to complement your professional business proposal

One of the most valuable skills in running a business is knowing when to hand over projects to professionals. When you work with B12, an expert team crafts a professional online presence

that is authentic to your company and has tools to help improve your workflow and onboarding process.

Professional website

Put simply, you need a website to compete in the business world today regardless of your industry. Avoid the stress, frustration, and hassle of building your site and the expense of hiring a designer by working with B12. You get an expert-built website based on your unique business information and preferences.

Augment your online presence with an SEO subscription, dedicated blogging services, and ongoing support to add pages, change services and products, or rebrand.

Customizable forms

An automated onboarding process is one of the best ways to streamline your workflow and start attracting high-value clients. With B12, you can liberate yourself from the constant emailing with prospects to get the information you need to onboard them as a new client.

Incorporate a customizable form onto your B12 site, and start generating new leads 24/7 with prospects submitting the information you request, from their contact information to their budget and timeline. You can store client information, such as appointment history and special requests, in one accessible central location.

Online scheduling

Trying to schedule even a single client for a free quote or onboarding session is time-consuming. The hassle grows exponentially if you're trying to scale your business with multiple new clients every week. The B12 online scheduling feature lets you set your availability and ask prospects to self-schedule. You never have to worry about double-booking, and you can limit new client calls to a few hours a day or a few days every week.

Send invoices and accept digital payments

One of the most stressful parts of running a service-based business is collecting and tracking payments. B12 eliminates the hassle of using individual [invoicing and payment](#) collection services by enabling companies to do everything through their website. Track sent invoices, collect payments, and automate payment reminders. Offer diverse payment options with either credit card or bank transfer, and get funds sent to your business account.

Simplify your workflow and grow your business with B12

You can use a single platform to organize all facets of your business, from attracting prospects to onboarding, scheduling, invoicing, and payments with B12. We make running a service firm easier than ever, bringing your entire business online in only [30 days](#).