

Sales Opportunity Proposal

Consultation

1. Client Information

Client Name

Enter client name

Company

Enter company name

Contact Details

Enter phone or email

Date

2. Overview of Opportunity

Project Title

Enter project title

Brief Description

Summarize the sales opportunity, goals, and needs.

3. Proposed Consultation Approach

Objectives

List main consultation objectives.

Scope of Work

Summarize activities, deliverables, and methods.

Timeline

e.g. 4 weeks, starting MM/DD/YYYY

4. Investment & Terms

| Service | Description | Fee |
|---------------------------|------------------------|-----|
| e.g. Initial Consultation | Details of the service | \$ |

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Terms & Payment

Outline terms, payment schedule, cancellation policy, etc.

5. Acceptance

Please confirm acceptance of this proposal by signing below.

Client Signature

Date

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Consultant Signature

Date

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