

Technical and Business Proposal Outline

A flexible structure for client proposals and formal solicitations

Use this outline to connect the requested work to a practical delivery plan, credible evidence and a supported budget. Reorder it to match the buyer’s instructions and evaluation criteria.

Use the actual solicitation or call as the authority. This is a planning and drafting template, not an official form. Replace bracketed text, expand the writing space, and remove instructions before submission. Retain the required order, word limits, forms and attachments.

Opportunity [Title, reference number and buyer]

Prepared by [Organization and proposal lead]

Submission [Date, time, time zone, portal or delivery method]

1 Executive overview

Draft this last as two focused paragraphs: who the organization is and what it will do, followed by the approach and relevant evidence of past performance. Adapt the length and sequence to the buyer’s instructions.

[Introduce the organization and its relevant role. State the buyer’s need, proposed scope, intended outcomes and delivery period.]

[Explain how the work will be delivered and the evidence that supports the approach. State any material dependency or condition. Include only verified, relevant past performance.]

2 Requirements and evaluation map

Copy the exact requirement references, including amendments. Add rows for every mandatory requirement and scored criterion. Do not treat an unanswered requirement as compliant.

Requirement or criterion	Response location	Evidence and owner	Status
[Reference and short requirement]	[Section or annex]	[Evidence source; owner]	[Open / met / gap]
[Reference and short requirement]	[Section or annex]	[Evidence source; owner]	[Open / met / gap]

Questions to resolve [Question, official clarification route, owner and due date]

Scope boundaries [What is included, excluded or dependent on buyer inputs]

Writing tip: mirror the buyer’s terms and answer each criterion directly. Explain the evidence behind a claim rather than relying on adjectives.

APPROACH AND DELIVERY

3 Technical approach

Explain how the work will be performed, why the method fits the requirement and how success will be checked. Include relevant standards, tools, interfaces or accessibility needs only when they apply.

Understanding of the requirement

[Describe the current situation, users or beneficiaries, operating context and constraints. Cite the source of material facts and mark assumptions that need confirmation.]

Method and work packages

[Describe each work package, the steps involved, inputs, responsible roles and outputs. Explain critical technical choices and the reason for them. Add work packages as needed.]

Dependencies and acceptance

[State the inputs, approvals, access and decisions needed from the buyer or partners. Explain acceptance criteria, review periods, handover and support arrangements.]

4 Delivery schedule

Milestone or deliverable	Timing	Acceptance evidence	Accountable role
[Deliverable 1]	[Date or week]	[Measurable completion criteria]	[Role]
[Deliverable 2]	[Date or week]	[Measurable completion criteria]	[Role]
[Deliverable 3]	[Date or week]	[Measurable completion criteria]	[Role]

5 Staffing and governance

Role and responsibilities	Relevant capability	Availability and allocation
[Delivery lead and authority]	[Verified experience or qualification]	[Confirmed dates and effort]
[Technical or support role]	[Verified experience or qualification]	[Confirmed dates and effort]

Governance [Reporting frequency, decision authority, escalation route and approval process for scope changes]

Writing tip: distinguish confirmed availability from proposed staffing. Explain how the schedule and staffing level support the same scope.

QUALITY RISK AND EVIDENCE

6 Quality assurance

[Describe review checkpoints, test or validation methods, acceptance records and responsibility for correcting defects. Explain how feedback will be recorded and resolved.]

Controls that apply [Required privacy, security, accessibility, safeguarding, environmental or other controls; responsible role and evidence]

Change control [How changes to scope, schedule or cost are assessed, approved and recorded]

7 Risks and contingencies

Describe causes and consequences. Assess likelihood and impact consistently, and identify a trigger for action. Add rows for material delivery, financial, partner and operational risks.

Risk and consequence	Assessment	Response and trigger	Owner
[Risk, cause and consequence]	[Likelihood; impact]	[Preventive action; contingency; trigger]	[Role]
[Risk, cause and consequence]	[Likelihood; impact]	[Preventive action; contingency; trigger]	[Role]

Remaining exposure [Risk that remains after controls, any required acceptance and the approving role]

8 Relevant experience and evidence

Use only work you can substantiate and are permitted to disclose. Clarify your organization’s actual role, especially for consortium or subcontracted work. Obtain permission before naming a reference.

Relevant assignment	Your role and scope	Evidence and relevance
[Assignment; dates; sector]	[Work actually performed]	[Verified result; source; relevance to this requirement]
[Assignment; dates; sector]	[Work actually performed]	[Verified result; source; relevance to this requirement]

Evidence gaps [Claim requiring verification, evidence owner and deadline; remove claims that cannot be supported]

Writing tip: keep outputs and outcomes distinct. A completed activity supports a delivery claim; it does not by itself establish a longer-term result.

BUDGET AND SUBMISSION REVIEW**9 Budget narrative and commercial assumptions**

Follow the prescribed pricing format. Keep financial information out of the technical volume if the instructions require separate submissions. Check quantities, rates and totals against the budget workbook.

Cost basis [Currency, pricing period, estimation date and basis of rates or quotations]

[Explain personnel effort, direct costs, partner or subcontract costs and permitted indirect costs. Link each major cost to a work package or deliverable. State the assumptions behind quantities and rates.]

Financial treatment [Applicable taxes, exchange-rate basis, cost escalation, contingency or exclusions, as permitted by the solicitation]

Commercial conditions [Required validity period, payment milestones and proposed conditions or deviations, only where permitted]

Consistency check [Name or role confirming that scope, schedule, staffing and budget agree; review date]

10 Annex register

Required attachment	Reference and version	Owner	Review status
[Official form or declaration]	[Call reference; filename]	[Role]	[Open / checked]
[CV, work plan or evidence]	[Call reference; filename]	[Role]	[Open / checked]
[Budget or other annex]	[Call reference; filename]	[Role]	[Open / checked]

11 Final review and submission

- Verify every mandatory requirement, amendment, page limit and attachment against the current instructions.
- Check claims, citations, figures, cross-references and permissions to disclose evidence. Remove unresolved placeholders and drafting instructions.
- Confirm authorized approvals, signatures, file names, file size limits and any separation of technical and financial volumes.
- Test the permitted submission route in time. Record the actual submission time and retain the receipt or confirmation.

Release authorization [Approving role, approval date, approved version and conditions]

Submission record [Submitting role, actual time and time zone, confirmation reference and saved receipt location]