YOUR  
LOGO

**COMPANY NAME**

FINANCIAL-KPI DASHBOARD PROPOSAL

Prepared by:

**[Client Name]**

**[Contact information]**

**[Date]**

# Introduction

Thank you for considering [Your Company Name] to support your organization with financial-kpi dashboard proposal. We deliver strategic, data-driven, and visually compelling financial services tailored to your needs.  
  
This proposal outlines our approach to delivering financial-kpi dashboard proposal for [Client Name].

# Project Objectives

- Provide real-time visibility into key financial metrics  
- Enable data-driven decision making  
- Streamline reporting for leadership and investors

# Proposed Services

- Define core KPIs (e.g., revenue, margin, cash burn)  
- Dashboard tool configuration (Power BI, Tableau, Google Sheets)  
- Integration with accounting and CRM systems  
- Role-based access and visualization setup

# Scope of Work

- Review reporting needs and define KPIs  
- Configure dashboard and connect data  
- Customize layout and automate refresh  
- Train team and launch platform

# Timeline

Proposed project timeline:

|  |  |  |
| --- | --- | --- |
| Phase | Description | Estimated Date |
| Discovery | Define KPIs and reporting goals | [Start Date] |
| Setup | Build dashboard and test data | [Date] |
| Launch & Training | Finalize and train team | [Completion Date] |

# Pricing

Estimated cost breakdown:

|  |  |  |
| --- | --- | --- |
| Service | Description | Cost |
| KPI Definition | Business metrics selection | [Amount] |
| Dashboard Build | System setup and visuals | [Amount] |
| Training & Support | Team onboarding and maintenance | [Amount] |
| Total Estimated Fee |  | [Total] |

# About Us

[Your Company Name] is a trusted analytics partner for CFOs and operators.

# Case Studies / Testimonials

Built a dashboard suite for a healthcare firm tracking revenue, costs, and headcount weekly.

# Terms and Conditions

Terms: 40% upfront, 60% on delivery. Ongoing maintenance available monthly.

# Acceptance

To approve this proposal and initiate services, please sign below.  
  
Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Name: [Client Name]  
Title: [Title]  
Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_