YOUR
LOGO

**COMPANY NAME**

SALES-FUNNEL AUDIT PROPOSAL

Prepared by:

**[Client Name]**

**[Contact information]**

**[Date]**

# Introduction

Thank you for considering [Your Company Name] to conduct a Sales-Funnel Audit for your organization. We specialize in analyzing and optimizing sales processes to enhance conversion rates, reduce bottlenecks, and improve revenue performance.

This proposal outlines our approach to auditing and refining the sales funnel for [Client Name].

# Project Objectives

The primary goals are:

- Assess the effectiveness of current sales funnel stages
- Identify gaps, drop-off points, and optimization opportunities
- Improve lead conversion rates and sales velocity
- Provide actionable recommendations for funnel enhancement

# Proposed Services

Our sales-funnel audit services include:

- Comprehensive review of existing sales funnel stages
- Analysis of lead qualification, nurturing, and conversion processes
- Identification of bottlenecks and leakage points
- Recommendations for process improvements and automation
- Development of optimized funnel metrics and KPIs

# Scope of Work

Scope includes:

- Initial discovery session and data collection
- Funnel performance analysis and benchmarking
- Stakeholder interviews and workflow reviews
- Delivery of audit report with prioritized recommendations
- Post-audit consultation for implementation support

# Timeline

Proposed project timeline:

|  |  |  |
| --- | --- | --- |
| Phase | Description | Estimated Date |
| Discovery & Data Collection | Understand current sales funnel structure and metrics | [Start Date] |
| Funnel Analysis & Benchmarking | Analyze funnel performance and identify issues | [Date] |
| Reporting & Recommendations | Deliver audit findings and improvement plan | [Date] |
| Post-Audit Consultation | Support implementation of recommended actions | [Completion Date] |

# Pricing

Estimated cost breakdown for sales-funnel audit services:

|  |  |  |
| --- | --- | --- |
| Service | Description | Cost |
| Discovery & Data Collection | Gather sales funnel data and define scope | [Amount] |
| Funnel Analysis & Diagnostics | Conduct in-depth funnel performance assessment | [Amount] |
| Audit Reporting & Strategy | Deliver findings and improvement recommendations | [Amount] |
| Implementation Support | Assist with post-audit strategy execution | [Amount] |
| Total Estimated Fee |  | [Total] |

# About Us

[Your Company Name] is a trusted expert in sales optimization and funnel performance enhancement.

- Experience: [X] years in sales consulting and process improvement
- Expertise: Funnel analysis, lead nurturing, conversion optimization
- Mission: To help businesses maximize revenue through streamlined and effective sales processes

# Case Studies / Testimonials

Case Study: [Client Example]

- Project: Sales-funnel audit for a B2B services provider
- Outcome: Increased lead-to-customer conversion rate by 30% and reduced sales cycle time

Testimonial:
“[Your Company Name] provided invaluable insights that significantly improved our sales process efficiency and results.” — [Client Contact]

# Terms and Conditions

Payment Terms: [X]% deposit, milestone payments.
Service Scope: Includes assessment, analysis, reporting, and support.
Client Responsibilities: Provide access to CRM data, sales processes, and relevant stakeholders.
Adjustments: Scope changes require mutual agreement and may affect cost and timeline.

# Acceptance

To approve this sales-funnel audit proposal and initiate services, please sign below.

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
Name: [Client Name]
Title: [Title]
Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_