Project Proposal Template

Have a great idea for a project? Before you can start, you need to get buy-in and approval from sponsors, managers, and other stakeholders. Use this template to create a project proposal that clearly conveys your ideas and shows how your project will benefit the company and your customers. Even if your organization uses a standard form for project requests, this document offers guidance for developing a concise, compelling proposal.

HubSpot Tip: Consider including an Executive Summary to give an overview of the main points in your project proposal, especially if you will be submitting it to busy c-level executives.

Background

Chances are, your project idea originated when you noticed a problem the company was facing and thought about how you would solve it. Begin your project proposal by giving a summary of the history and context of the issue that your project addresses.

Start by describing the problem from the broadest perspective, then move into a more detailed explanation about the specifics. Be sure to provide enough information so that everyone who reads your document will gain a good understanding of the background just by reading this section.

Include a history of any similar projects you have led successfully in the past; doing so lends credibility and will make project sponsors feel more confident about your likelihood of success.

HubSpot Tip: You have listed your past successes, but what if another project attempted to solve this problem in the past, and failed? Be sure to include this in the background section. You can also provide a brief assessment of why you think the previous project failed and how you have designed the current project for success.

Project Summary

Objectives

List the objectives your project will address. Each objective should be specific and should be complete with measurable outcomes. You should indicate what will constitute a successful outcome for each objective and how you will measure it.

- Objective 1
- Objective 2
- Objective 3

Scope

Will your project take place over multiple phases? Describe each phase here.

- Phase 1
- Phase 2
- Phase 3

HubSpot Tip: Of course you should tell the reader what your project would entail, but you may also want to indicate what it will <u>not</u> include. Clarifying expectations now will make staying within budget and on schedule easier during project execution.

Alignment with Strategic Goals

Your goal is to get your proposal approved so you can begin working on your project. To accomplish this, you will need to show that the project objectives are in line with the strategic goals of the organization.

Consider using a table like the one below to supplement your narrative explanation of how your project supports the company's long- and short-term goals.

Company Strategic Goal	Associated Project Objective

HubSpot Tip: Often a company's strategic goals are captured in a strategic plan. Your manager may be able to share this information with you.

Project Activities and Timeline

Now that you have outlined the objectives and phases of your project, you should break them down into activities. To make the schedule of activities for your project clear, present them graphically in a table like the one shown below.

Project Phase	Project Activity	Start Date	Completion Date

HubSpot Tip: Including a detailed schedule in your proposal shows your commitment to effective project management.

Roles and Responsibilities

You have described the project activities, but someone needs to complete each of the tasks! Your proposed team is essential to the success of your project. Using a table like the one below, indicate the name, position, and specific duties of each of your team members and stakeholders.

Name	Project Role	Responsibilities

Depending on the type of project you are proposing, it might make sense to include brief biographical sketches of your proposed team members to highlight their qualifications. If it would strengthen your proposal, you might even consider including full resumes in an appendix.

HubSpot Tip: Has your proposed team completed similar project in the past? Past successes are a strong indicator of future success, so you should include examples of successful past performance, if possible.

Project Budget

Almost every project will require a budget in order to succeed. Whether your project requires funding in the traditional sense, or just time from participants or access to supplies that are already available at the office, be sure to clearly indicate the resources needed, so that your readers can easily give their approval.

HubSpot Tip: Differentiate one-time and recurring expenses in your budget.

Conclusion

Remember those objectives that you outlined at the beginning of the proposal? You should reiterate them here. Show the reader exactly what you intend to accomplish and briefly summarize how you will do it.

Now, tell the reader what you need in order to make the project a reality. Perhaps you need the proposal to be forwarded on to higher management for review, or to accounting for budget approval, or maybe you just need a signature. Indicate the next steps here.

HubSpot Tip: Consider including your contact information (email address and phone number) in this section, in case the reader has a question and needs to get in touch with you quickly.

Authorization

Include a section for signatures and approval by the project sponsors and any other relevant leaders. You should include signature lines directly in the document, like shown below.

_____   _____   _____

[Name], Project Sponsor   [Name], Project Sponsor   [Name], Project Manager

HubSpot Tip: Include signature lines for anyone who needs to give their official approval for the project to begin. Be sure to fill in their names to personalize the document.

Appendices

To include supplementary information without distracting the reader, reference it briefly in the narrative of your project proposal and then insert it into an appendix. That way, additional details are available to anyone who wants or needs them, but the extra content will not dilute your message or make your document excessively long.

HubSpot Tip: Some pieces of information that you might include as appendices are: additional research on the problem, resumes of key proposed staff, and additional data to back up the claims you have made in your proposal.