How to Send a Proposal to the Client

Purpose

- To ensure proposals are sent to clients in a consistent, accurate, and professional manner.

- This SOP ensures correct client details are used, the right email template is applied, the proposal deck is properly attached, and clients are entered into the correct automation flow.

- Following this process prevents mistakes such as sending unapproved proposals, using the wrong template, or missing critical automation steps.

Inputs

- Approved proposal deck

- Client information (from internal notification in GSD sub-account)

- Standard email templates (see **Appendix A**)

- Access to automation system (Focus Plan, Growth Plan, or PM redirect)

Procedure

Step 1: Confirm Proposal Readiness

- Ensure the proposal deck is finalized, reviewed, and approved by the relevant internal stakeholders.

Step 2: Access Client Information

- Open the internal notification and confirm the client's details (name, company, and email address).

- Ensure you are working within the correct GSD sub-account.

Step 3: Select the Correct Email Template

- Use the **School Founder version** if the client is a school founder (Get Schools Done).
- Use the **Entrepreneur version** if the client is a business founder/entrepreneur (Get Shit Done).

Step 4: Personalize the Email

- Fill in placeholders: [First Name], [School Name]/[Business Name], and [your name] should be “GSD Ninjas Team”.
- Add any relevant notes from the discovery call.

Step 5: Attach the Proposal Deck

- Attach the approved proposal deck.
- Confirm the correct and most recent version is attached.

Step 6: Review and Proofread

- Double-check email content, client details, and attachment.
- Ensure the tone and branding align with company standards.

Step 7: Send the Proposal Email

- Send the email via the GSD sub-account.
- Verify it was successfully sent and not flagged as undeliverable.

Step 8: Assign Client to the Correct Automation

- If the client is on a **Focus Plan** → Add them to the Focus Plan - Service Agreement automation.
- If the client is on a **Growth Plan** → Add them to the Growth Plan - Service Agreement automation.

- If the client has a **Custom Plan** → Redirect to the assigned Project Manager (PM) for manual onboarding.

Step 9: Log the Activity

- Record the proposal submission in the tracking system (CRM or project tracker).
- Notify the internal team that the proposal has been sent and automation assigned.

Outputs

- Client receives the correct proposal email with the deck attached.
- Client is placed into the correct automation workflow (Focus, Growth, or PM).
- Internal records confirm proposal submission and workflow assignment.

FAQs

- **Q: What if I'm unsure which email template to use?**
  A: Refer to the client type: School Founder → School Founder version; Entrepreneur → Entrepreneur version. If unclear, confirm with your manager.
- **Q: What if I forget to assign the client to automation?**
  A: Update the record as soon as possible. If already onboarded, coordinate with the PM to avoid duplication.
- **Q: What if the client requests changes to the proposal?**
  A: Notify your manager and prepare a revised version before resending.

Appendix A: Email Templates

School Founder Version (Get Schools Done)

Subject: Proposal to Help [School Name] Grow & Thrive

Hi [First Name],

Thank you again for your time on our discovery call. Based on what you shared, we've put together a custom proposal for you.

📑 Please see the attached proposal deck for details. This proposal will be referred to as Schedule A in the Service Agreement.

👉 Next Step: If you're ready to move forward, simply sign the Service Agreement we'll send you. Once it's signed, your invoice will be issued automatically and we'll kick off onboarding right away.

Excited to help you simplify enrollment, strengthen parent communication, and free you to focus on leading your school.

– [Your Name]

Note: Schedule A defines the scope and pricing of your package — the agreement ensures everything is locked in legally.

Entrepreneur Version (Get Shit Done)

Subject: Proposal to Help [Business Name] Scale & Streamline

Hi [First Name],

Thank you again for your time on our discovery call. Based on what you shared, we've put together a custom proposal for you.

📑 Please see the attached proposal deck for details. This proposal will be referred to as Schedule A in the Service Agreement.

👉 Next Step: If you're ready to move forward, simply sign the Service Agreement we'll send you. Once it's signed, your invoice will be issued automatically and we'll kick off onboarding right away.

Excited to help you capture more leads, automate your workflows, and scale your business without the overwhelm.

– [Your Name]

Note: Schedule A defines the scope and pricing of your package — the agreement ensures everything is locked in legally.