Training Proposal – Sample Proposal Content

**ABC Company**

**Training Proposal**

**Date:**

**Customer Name**

**Project\*:**

Project name or just the equipment name/number

**Proposal Scope\*:**

The range of the total training project—this may include things like needs assessment, course design/development, documentation development, training sessions, evaluation, coordination, etc.)

**Background:**

You may or may not need to include this section. This typically includes the context of the training—why it is needed, what prompted it, etc. This is also your way of clarifying what you heard the customer wants. The target project dates can be included here too.

**Approach:**

You may have a certain approach to training that is important to share with the customer. Ex. All training is held at the vendor’s training center, delivered with internal **S**ubject **M**atter **E**xperts (SME)/trainers etc.

**Deliverables\*:**

This is the list of tangible items that will be provided to the customer, including the specific training, documentation, etc. It’s an excellent idea to attach sample course overviews with the proposal to give the customers more details. If you don’t do this with the proposal, it should be sent once you identify their specific needs.

**Timeline\*:**

This shows when each of the deliverables will happen. In the case of documentation there would be draft, validation and completion dates.

**Cost\*:** *(You might want to title this “Investment” instead)*

List the specific cost per deliverable plus the total overall cost. **NEVER** *just* send a service fee schedule because it doesn’t tell your customer the cost of the training for the project.

**Expectations:**

List special requirements you may need like a training contact, access to SME’s to develop the materials, data projector, etc. If you do a partnership agreement this may not be necessary. BUT, if you don’t do a partnership agreement it’s a great place to put this type of information—your responsibilities, their responsibilities.)

***\*****These components* ***MUST*** *be included in any proposal*