**Marketing Acceleration Proposal**

**for X, Inc.**

I do not give legal advice of any kind and you are responsible for changing these words and protecting yourself.

**Situation Appraisal:**

Describe what they want to change: List everything that’s broken.

You have been doing the bookkeeping yourself and are 6 months behind. You do not have good metrics or updated financial statements. You are unsure of your cash balance. You are doing payroll manually which is taking 90 hours per year. Your shopping cart system does not interface with your bookkeeping system. You have not filed your 2014 taxes. .

**Objectives:**

These are the client’s objectives and what you can help with them.

* Catch up on the bookkeeping so that it’s up to date.
* Generate monthly financial reports.
* Automate payroll.
* Complete and file 2014 federal tax return. .

**Measures of Success:**

* Books are current every month.
* Federal taxes are current.
* 50 hours or $1,000 per year is saved on payroll labor.
* Improved peace of mind knowing your books and taxes are current.
* Improved decision-making ability.
* Improved feeling of being organized.

**Value:**

These will be things you’re pretty sure the client will like but did not specifically mention in the interview.

* Your employees will have their own payroll portal, which saves time during employee onboarding as well as helps the employee have more control. .
* We annotate transactions and report balances in your accounting system to facilitate communication, ask questions, cut down on email, and point out business opportunities or trends.
* We maintain our Certified QuickBooks ProAdvisor to help us maintain our expertise in QuickBooks technology.

**Options for x.**

**Option #1 Silver Package**

Monthly:

* A/R
* A/P
* Bank Reconciliation

One-time

* Automate your bi-weekly payroll with 4 employees. Includes direct deposit, quarterly federal and state reports, annual W-2s and 940 report, and bonus payroll.

**Time Frame:**  Monthly and One time: 30-90 days

**Investment:** $x plus out of pocket expenses (travel, payroll fee of $41 per month).

**Payment Plans:**  2-pay or 3-pay plans available 30 days apart.

**Option #2**

**Option #3**

**Testimonials**

**About Our Company**

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