

Brightwave Studio

Digital products that grow businesses

BUSINESS PROPOSAL

Customer Portal Redesign

A faster, self-service experience for Harbor Point clients

PREPARED FOR

Emily Carter

Head of Customer Experience
Harbor Point Consulting

PREPARED BY

Daniel Brooks

Account Director
Brightwave Studio

PROPOSAL

No. BW-2026-031

Issued October 14, 2026
Valid until November 13, 2026

Dear Emily,

Thank you for the opportunity to support Harbor Point Consulting. Following our discovery call, we have prepared this proposal to redesign your customer portal and make it easier for your clients to find answers, track engagements and pay invoices online.

01 Executive Summary

Your clients currently rely on email and phone calls for routine requests, which puts pressure on your account managers. We propose a redesigned portal with self-service tracking, a searchable knowledge base and integrated payments, delivered in three phases over twelve weeks.

02 Your Goals

- ✓ Reduce routine support requests by giving clients self-service access
- ✓ Shorten the time from invoice to payment
- ✓ Present a modern, consistent brand to every client
- ✓ Give account managers a clear view of client activity

03 Proposed Solution

We will redesign the portal around the three tasks your clients perform most, and connect it to your existing CRM and billing systems so the data stays in sync.

UX research & design	Client interviews, journey mapping and a clickable prototype validated with five of your key accounts.
Portal development	Responsive front end, secure sign-in and dashboards for engagements, documents and invoices.
Integrations	Two-way sync with your CRM and online card payments through your existing billing provider.
Launch & training	Staged rollout, training sessions for your team and 30 days of post-launch support.

WHY BRIGHTWAVE STUDIO

We have delivered client portals for twelve professional services firms in the last three years, with an average 38% drop in routine support requests within six months of launch.

04 Investment

The table below details the products and services included in this proposal. All amounts are in USD.

ITEM	QTY	UNIT PRICE	AMOUNT
Discovery & UX design Research, journey mapping, prototype	1	9,500.00	9,500.00
Front-end development Responsive portal, 12 screens	1	18,400.00	18,400.00
CRM & billing integrations Two-way CRM sync, online payments	2	4,200.00	8,400.00
Training sessions Remote, up to 10 attendees each	3	450.00	1,350.00
Subtotal			37,650.00
Discount (5% multi-phase)			- 1,882.50
Total (USD)			35,767.50

05 Timeline & Next Steps

Proposal review call Walk through the proposal and answer open questions.	Oct 21, 2026
Contract signature Sign the agreement and confirm the project start date.	Oct 28, 2026
Project kickoff Kickoff workshop with your team and stakeholder interviews.	Nov 3, 2026

06 Terms

50% of the total investment is invoiced at signature and 50% at launch. Invoices are payable within 30 days. Additional requests outside the agreed scope are estimated separately and only started after written approval.

07 Acceptance

By signing below, both parties agree to the scope, pricing and terms described in this proposal.

FOR BRIGHTWAVE STUDIO

FOR HARBOR POINT CONSULTING

Daniel Brooks
Account Director
Date: _____

Emily Carter
Head of Customer Experience
Date: _____