Brightwave Studio
Digital products that grow businesses

BUSINESS PROPOSAL

Marketing Automation Setup

Fewer manual tasks and better follow-up at Vertex Logistics

PREPARED FOR
Hannah Schultz
VP of Sales
Vertex Logistics

PREPARED BY
Priya Nair
Senior Account Executive
Brightwave Studio

PROPOSAL
No. BW-2026-034
Issued October 23, 2026
Valid until November 22, 2026

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Dear Hannah,

Thank you for the opportunity to support Vertex Logistics. Following our discovery call, we have prepared this proposal to set up marketing automation that follows up with every lead at the right moment.

01 Executive Summary

Leads come in from several sources and are followed up by hand, so many of them go cold before anyone replies. We propose a connected automation setup with lead scoring, email sequences and reporting, delivered in three phases over eight weeks.

02 Your Goals

- ✓ Reply to every new lead within minutes
- ✓ Score leads so sales focuses on the best ones
- ✓ Run nurture emails without manual work
- ✓ Report on every stage from lead to deal

03 Proposed Solution

We will connect your forms, CRM and email platform, then build the sequences and reports your team needs, starting with the highest-value leads.

Audit & strategy	Review of your funnel, data and tools, with a prioritized plan.
CRM & forms integration	Every lead source connected to one CRM with clean data.
Email sequences	Five automated sequences with tested copy and timing.
Reporting dashboard	A live dashboard for leads, conversion and revenue.

> **WHY BRIGHTWAVE STUDIO**
> We have configured automation for thirty-one B2B companies, and most see their lead response time fall below ten minutes.

04 Investment

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

ITEM	QTY	UNIT PRICE	AMOUNT
Funnel audit & strategy Review and action plan	1	4,800.00	**4,800.00**
CRM & forms integration Up to 6 lead sources	1	6,400.00	**6,400.00**
Email sequences Copy, setup and testing	5	1,150.00	**5,750.00**
Reporting dashboard Live dashboard, 12 metrics	1	3,200.00	**3,200.00**

Subtotal	**20,150.00**
Tax (8%)	**1,612.00**
Total (USD)	**21,762.00**

05 Timeline & Next Steps

Proposal review call — Oct 30, 2026
Walk through the proposal and answer open questions.

Contract signature — Nov 6, 2026
Sign the agreement and confirm the project start date.

Project kickoff — Nov 12, 2026
Kickoff workshop with your team and stakeholder interviews.

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

Priya Nair
Senior Account Executive

Date: _____

FOR VERTEX LOGISTICS

Hannah Schultz
VP of Sales

Date: _____