Brightwave Studio
Digital products that grow businesses

BUSINESS PROPOSAL

Customer Portal Redesign

A faster, self-service experience for Cedar Ridge clients

PREPARED FOR
Marcus Webb
Director of Client Services
Cedar Ridge Financial

PREPARED BY
Priya Nair
Senior Account Executive
Brightwave Studio

PROPOSAL
No. BW-2026-036
Issued October 29, 2026
Valid until November 28, 2026

brightwave.studio · hello@brightwave.studio · +1 (415) 555-0142

Dear Marcus,

Thank you for the opportunity to support Cedar Ridge Financial. 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	3	4,200.00	**12,600.00**
Training sessions Remote, up to 10 attendees each	4	450.00	**1,800.00**
	Subtotal		**42,300.00**
	Total (USD)		**42,300.00**

05 Timeline & Next Steps

Proposal review call — Nov 5, 2026
Walk through the proposal and answer open questions.

Contract signature — Nov 12, 2026
Sign the agreement and confirm the project start date.

Project kickoff — Nov 18, 2026
Kickoff workshop with your team and stakeholder interviews.

06 Terms

Invoices are payable within 30 days. 30% of the total investment is invoiced at signature, 40% at design approval and 30% at launch. 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 CEDAR RIDGE FINANCIAL

Marcus Webb
Director of Client Services

Date: _____