



PROFESSIONAL BUSINESS DOCUMENTS CUSTOM QUOTE INQUIRY

Tell us what professional documents your business needs so All Things Business can prepare an accurate customized quote.

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Use this form for professional business documents such as proposals, capability statements, business plans, reports, policies, SOPs, manuals, presentations, fillable forms, templates, and branded office documents.

1. Contact Information

Full Name *

Business Name *

Email Address *

Phone Number *

Website (if applicable)

Preferred Contact Method

2. About Your Business

What type of business or organization do you operate? *

Briefly describe your business, products/services, and target audience. *

How long have you been in business?

☐ Planning / Startup

☐ Less than 1 Year

☐ 1-3 Years

☐ 4-7 Years

☐ 8+ Years

☐ Not Applicable

Number of employees / team members

☐ Just Me

☐ 2-5

☐ 6-10

☐ 11-25

☐ 26+

☐ Not Applicable



DOCUMENT TYPES NEEDED

Select the professional business documents you need created, redesigned, updated, or made fillable.

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3. Professional Business Documents Needed

Business & Growth

- ☐ Business Plan
- ☐ Executive Summary
- ☐ Capability Statement
- ☐ Company Profile
- ☐ Proposal
- ☐ Pitch / Funding Packet
- ☐ Strategic Plan
- ☐ Marketing Plan

Operations & Internal

- ☐ Policies / Procedures
- ☐ SOPs
- ☐ Employee / Office Manual
- ☐ Forms / Fillable PDFs
- ☐ Tracking Logs
- ☐ Reports
- ☐ Spreadsheets
- ☐ Meeting / Project Templates

Client-Facing / Branded

- ☐ Letterhead
- ☐ Professional Letters
- ☐ Invoices / Estimates
- ☐ Client Intake Forms
- ☐ Service Agreements
- ☐ Presentation Decks
- ☐ Catalogs / Booklets
- ☐ Branded Templates

4. Type of Work Needed

- ☐ Create from scratch
- ☐ Update wording/content
- ☐ Add business branding
- ☐ Convert scan/PDF to editable
- ☐ Redesign existing document
- ☐ Reformat for professional appearance
- ☐ Make document fillable
- ☐ Create reusable template

List the specific documents you need help with. *



CONTENT, STRUCTURE & SOURCE MATERIALS

Tell us what content you already have and what support is needed to complete the documents.

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5. Content Readiness

- | | |
|--|--|
| ☐ All content is ready | ☐ Some content is ready |
| ☐ Need help organizing content | ☐ Need help polishing wording |
| ☐ Need help writing from notes | ☐ Using old document as reference |
| ☐ Need research / information gathering | ☐ Starting from scratch |

What source materials are available? - select all that apply

- | | |
|---|--|
| ☐ Word documents | ☐ PDF files |
| ☐ Scanned documents | ☐ Spreadsheets |
| ☐ Photos / screenshots | ☐ Old templates |
| ☐ Brand kit / logo | ☐ None yet |

6. Required Content & Structure

Describe any required sections, wording, data, or information that must be included.

Who is the intended audience for these documents?

What action should the reader take after reviewing the document?



BRANDING, STYLE & FORMAT

Tell us how you want the final documents to look, feel, and function.

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7. Branding & Visual Style

- | | |
|--|---|
| ☐ Use my existing logo/colors | ☐ Use my full brand kit |
| ☐ Clean & minimal | ☐ Corporate / professional |
| ☐ Luxury / premium | ☐ Bold / modern |
| ☐ Traditional / formal | ☐ Need design guidance |

Describe your preferred colors, fonts, layout, or overall style.

8. Final File Format

- | | |
|--|--|
| ☐ PDF | ☐ Fillable PDF |
| ☐ Editable Word | ☐ Excel / Spreadsheet |
| ☐ PowerPoint | ☐ Canva-ready |
| ☐ Print-ready PDF | ☐ Other |

Will the document need any of these features?

- | | |
|--|--|
| ☐ Fillable fields | ☐ Checkboxes |
| ☐ Signature fields | ☐ Clickable links |
| ☐ Table of contents | ☐ Page numbering |
| ☐ Charts / tables | ☐ Reusable template |



PROJECT SIZE, REVIEW & TIMELINE

Provide the document volume, approval process, and schedule for your project.

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9. Project Size

How many separate documents do you need?

Estimated total page count (if known)

How many revision rounds do you expect?

☐ 1 Round

☐ 2 Rounds

☐ 3 Rounds

☐ Not Sure

Who will review and approve the final documents?

10. Timeline

☐ Rush / ASAP

☐ Within 1 Week

☐ Within 2 Weeks

☐ Within 30 Days

☐ 1-3 Months

☐ Flexible

Final due date or important event date (if applicable)

Explain any deadline requirements or project milestones.



BUDGET, GOALS & ADDITIONAL DETAILS

Tell us your budget range and what success should look like for this document project.

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11. Budget

- | | |
|--|--|
| ☐ Under \$100 | ☐ \$100-\$250 |
| ☐ \$250-\$500 | ☐ \$500-\$750 |
| ☐ \$750-\$1,000 | ☐ \$1,000-\$1,500 |
| ☐ \$1,500+ | ☐ Need a Recommendation |

Preferred pricing structure

- | | |
|---|---|
| ☐ One-time project quote | ☐ Per-document pricing |
| ☐ Custom package | ☐ Ongoing document support |
| ☐ Not Sure | |

12. Project Goals

- | | |
|---|---|
| ☐ Look more professional | ☐ Improve organization |
| ☐ Save time | ☐ Support funding / growth |
| ☐ Improve client communication | ☐ Prepare for bids / proposals |
| ☐ Standardize operations | ☐ Create reusable systems |

What would make this project successful for you? *

Additional instructions or information



AUTHORIZATION & RETURN INSTRUCTIONS

Review the authorization, sign the form, save your completed PDF, and return it to All Things Business.

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13. Authorization

- ☐ I certify that the information provided is accurate and authorize All Things Business to contact me regarding this Professional Business Documents inquiry, service recommendations, consultation, customized quote, and related project communication.

Client / Authorized Representative Name *

Date *

What Happens Next?

1. All Things Business reviews your requested documents, source materials, scope, and timeline.
2. A document recommendation and customized quote are prepared based on complexity, page count, design, and functionality.
3. If needed, a consultation is scheduled to clarify content, branding, formatting, or revision expectations.
4. After approval, document development begins and final files are delivered in the agreed formats.

RETURN COMPLETED FORM TO

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Save your completed PDF and attach it to your email.