

Business Proposal for James's Plumbing Company

Prepared By Gwin Analytics 819 Hillary Lane Lawrenceville, GA 30043 contact@gwinanalytics.com	Prepared For James's Plumbing Company 2004 Bluffdon St. Buford, GA 30529 Attention: James Hill, CEO
Date: July 26, 2026 Proposal: Monthly Business Snapshot Reporting Service	

Dear Mr. Hill,

Executive Summary

Gwin Analytics proposes providing James's Plumbing Company with a recurring Monthly Business Snapshot Report designed to give leadership a concise, easy-to-understand view of business performance. Each report transforms financial information into practical insights, helping management monitor trends, identify opportunities, and make informed business decisions.

Objective

Provide recurring executive-level Business Snapshot Reports that summarize financial performance, highlight meaningful trends, and support strategic decision-making.

Proposed Solution

Each month, Gwin Analytics will prepare a customized Business Snapshot Report that may include:

- Executive Summary
- Revenue Overview
- Revenue Trend Analysis
- Key Performance Highlights
- Charts and Visualizations
- Opportunities and Risks
- Actionable Business Recommendations

Benefits

- Saves time by simplifying financial information
- Improves visibility into monthly business performance
- Supports data-informed decisions
- Identifies trends and opportunities earlier
- Provides professional executive reporting
- Helps leadership communicate performance clearly

Timeline

Reports will be delivered during the first week of each month using the previous month's financial information.

Deliverables

- Business Snapshot Report (PDF)
- Executive Summary
- Revenue Analysis
- Trend Charts
- Written Recommendations

Investment

Pricing will be customized based on the scope of reporting, reporting frequency, and business requirements.

Why Gwin Analytics

Gwin Analytics specializes in transforming business data into concise, professional documents that help business owners understand performance without spending hours reviewing raw spreadsheets. Our focus is clear communication, practical insights, and decision support.

Next Steps

Thank you for considering Gwin Analytics. I welcome the opportunity to discuss your reporting needs and demonstrate how a Monthly Business Snapshot Report can support James's Plumbing Company's continued growth and success.