

EVENT PROPOSAL TEMPLATE CHECKLIST

Use this checklist to help you create the perfect client-focused event proposal every time.

REQUIREMENTS

Not meeting the basic requirements set out by the client is a guaranteed route to failure.

Check off all that apply:

- Include a company overview
- State why you are perfect for the contract
- Include relevant case studies and statistics
- Include team member profiles
- Follow the client's formatting instructions
- Make sure the order of sections is correct
- Ensure the budget is handled in line with client expectation
- Include high and low budget options
- Include upsells
- Identify new forms of revenue if possible
- Include your environmental policy

MESSAGING

Ensure that you understand the needs of your client by speaking their language.

Check off all that apply:

- Create detailed client personas
- Ensure language is client focused
- Specific details within the proposal tie back to client needs/objectives
- Messaging reflects your personality
- Images

Use the right kind of imagery to strengthen your proposal and inspire your clients.

CHECK OFF ALL THAT APPLY:

- Use images that inspire your client
- Use images that make the client feel you are the right company for the job
- Use images containing people
- Use original images - avoid stock images
- Use high-quality images
- Design

Good design is a key factor in presenting the right image to your clients.

CHECK OFF ALL THAT APPLY:

- The design emphasizes and reinforces the messaging
- It reflects reflects your personality, professionalism and level of service
- It uses a master template
- Use a library for reusable design elements
- Innovation

Ensure that you are innovative to stand out from the pack.

CHECK OFF ALL THAT APPLY:

- Your proposal contains something new and exciting that the client won't have seen/heard before
- Enhance your proposal with video
- Include testimonials that highlight innovation
- Use 3D visuals
- Put clients inside venues with immersive technology
- Use a stunning format (interactive web page rather than PDF)

FINAL CHECKLIST

- Have you met the client's basic requirements?
- Have you answered all questions and criteria?
- Is your messaging client focused?
- Have you made effective use of images?
- Is your proposal well designed?
- Is your proposal innovative?