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 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?