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 be- fore

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?

