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?

