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?