

# Proposal Checklist

An event proposal helps to move your negotiation process forward and sets the groundwork for project planning. When putting your proposal together, make sure you understand the following.

## Proposal Type

What is the focus of the proposal you are preparing? There are three main types of proposal:

1. Pricing
2. Technical
3. Creative

1. **Pricing:** the client gives you some ideas of what the project will be and then compares you against other planners based on price. For this type of proposal they frequently just flip to the back and look at costs and price to them. This style of proposal:
  - Clearly spells out event elements and avoids “flowery”, poetic language
  - Includes all line items in the correct currency
  - Includes clear and exact terms for pricing
  - Helps the reader make a decision based on their budget
  - Is frequently submitted to a procurement department (the same people who buy pencils for a corporation are reviewing your proposal)
2. **Technical:** the client gives you a request and you need to demonstrate competence in an area such as culinary, transportation, audio visual, or another area of expertise. This style of proposal:
  - Offers schematics (e.g. a map of a stadium with crowd control measures noted)
  - Comparisons between elements (alternative choices and options)
  - Outputs and data (impacts of specific choices)
  - Is frequently decided based on the components of your design and the extent to which this achieves their technical needs
3. **Creative:** the client wants to know that you, as a planner, have a level of creativity and a vision for the experience. This style of proposal:
  - Includes descriptive paragraphs, images, links to videos to create a ‘wow factor’ on the page
  - Strives to “paint the picture” of the experience
  - Evokes emotion – you want the reader to feel, rather than think, about the event
  - Is frequently decided based on your ability to share ideas creatively

Once you understand the focus of the proposal, use the next page to ensure your submission has all the ‘nuts and bolts’ required to form the basis of a future contract.

# Proposal Content

## Document information

- Document date
- Version number
- Your company name
- Your name
- Your contact info

## Creative License

Speak with an attorney and state clearly and up front:

- What's included
- Who can view
- Who can use the information contained therein for which purpose

## Terms

- How long is the information in the proposal valid? (e.g. pricing doesn't last forever)
- What is the proposal based on? (e.g. number of people)

## Client profile

- Who this is for (e.g. a specific department, a specific person)
- What client parameters the document is based on

## Your Company Pitch

- Qualifications
- Past Success
- Testimonial

## Content

- Parameters – how many people, the budget given, the dates given
- Deliverables
- Pricing
- Specifications
- Units, elements, materials for the event
- Event story
- Images of design components
- Physical samples (linens, florals)
- Audio
- Video
- CAD maps and floor plans

Remember to communicate your brand with your style – buttoned up and scientific, or fun and expressive?

*Did you copy-and-paste? Did you find-and-replace? Always read each and every page to double check that you are submitting a tailored proposal for this specific client!*