Project Proposal Template

Project: [Project name]

Prepared for: [Client name, contact person]

Prepared by: [Your name / company]

Date: [Date] **Valid until:** [Date]

1. Summary

[3–4 sentences: the client's goal, what you propose, the main result, timeline and total in one line.]

2. The client's situation

[What the client told you: current state, problem, why it matters now. Use their words where possible.]

3. Goals and success criteria

- [Goal 1] — measured by [metric / how we will know]
- [Goal 2] — measured by [...]

4. Proposed approach

[How you will do it: phases or steps, one short paragraph each.]

5. Deliverables

Deliverable	Description	Due
[...]	[...]	[...]

6. Timeline

Phase	Start	End	Milestone
[...]	[...]	[...]	[...]

7. Out of scope

- [What is not included]

8. Investment

Item	Amount
[...]	[...]
Total	[...]

Payment terms: [e.g. 50% on signing, 50% on delivery]

9. What we need from you

- [Access, materials, decision-maker availability, approvals]

10. About us

[2–3 sentences and 1–2 relevant past projects.]

11. Next steps

1. [Confirm scope by date]
2. [Sign SOW / agreement]
3. [Kickoff on date]

How to fill it in

- Write sections 2 and 3 from the client's own words in the discovery call; they should recognise their problem.
- Write the summary last; it is often the only part a decision-maker reads.
- Every deliverable needs a due date; every goal needs a way to measure it.
- Say what is out of scope — it prevents most later disputes.
- Set a validity date for the price.
- Keep it to 2–5 pages. Detailed terms go into the statement of work.

What must not be in a proposal

- Promises of results you do not control.
- Prices or terms that differ from what you agreed verbally, without saying so.
- Other clients' confidential details in case studies.