

PROJECT PROPOSAL

This proposal is provided by Clientish as a free, editable starting point. Fill it from your discovery notes, keep the order (situation and value before price), tailor it to each prospect, and end with one clear next step. Replace the bracketed fields.

Prepared for: [Client / Company name]

Prepared by: [Your agency name]

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

1. Executive Summary

Write this last, read first. Two to four sentences: the client's problem, the outcome you propose, and your headline recommendation. Lead with them, not you.

[]

2. Your Situation

Their problem, in their own words. This proves the proposal was built on discovery and is for them specifically.

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3. Proposed Approach

How you will solve it, framed around the outcome. Lead with what it achieves; keep the mechanics proportionate.

[]

4. Scope and Deliverables

Deliverable	What it includes
[]	[]
[]	[]
[]	[]

Out of scope: [name what is not included, so expectations are clear]

5. Goals and Success Metrics

Goal	How success is measured
[]	[]
[]	[]

6. Timeline

Phase	What happens	Dates
[Phase 1]	[]	[]
[Phase 2]	[]	[]
[Phase 3]	[]	[]

7. Investment

Present after the value above. Offer tiered options where your work allows — a good/better/best, not a single ultimatum. Frame as an investment against the outcome.

	Essential	Recommended	Premium
What's included	[]	[]	[]
Price	[]	[]	[]

Payment terms: [e.g. 50% to begin, 50% on completion / monthly]. Full terms in the Statement of Work on acceptance.

8. Proof

Relevant case studies, results, and testimonials — kept relevant to their situation.

- [Case study / result 1]
- [Case study / result 2]
- [Testimonial]

9. About Us

Short, and placed late. The case is already made above; this supports it.

[]

10. Next Steps

One clear, frictionless action. Make saying yes easy.

To proceed:

1. [e.g. Reply to approve the Recommended option]
2. [e.g. We send the Statement of Work and first invoice]
3. [e.g. Kickoff call booked for the following week]

Accepted by (client)	Agency
Signature: _____	Signature: _____
Name: []	Name: []
Option selected: []	Date: _____
Date: _____	

Running the client relationship once this is in place? Clientish gives your client a branded portal on your own subdomain with their orders, invoices and support tickets in one place. Start a 7-day free trial at the Clientish site.