

THE ULTIMATE DIGITAL AGENCY

PROPOSAL CHECKLIST

Creating deal-winning proposals is no easy feat. Luckily, Marketing Agency Coach has you covered. Our proposal template coupled with this proposal checklist will ensure that you're writing the best proposal in the stack. Download our proposal template, customize it to suit your needs, and run the final product through this checklist. You'll shave hours off of your proposal process and start winning bigger deals faster.



1. Overview

- Does your proposal's name give insight into what it's about?
- Is your agency's logo and contact information easily accessible?
- Is your prospect's logo and brand apparent at first glance?
- Does the overview hook the reader?

2. Guiding Philosophy



"People don't buy what you do, they buy why you do it." -Simon Sinek

- Does your expertise shine through?
- Is your agency's brand positioned correctly?
- Have you clearly explained your higher purpose and your why?



3. Definitions

- Do the definitions reflect industry norms?
- Will someone outside of your industry be able to understand the proposal?
- Are all necessary terms defined?



4. Target Audience



- Did you create a customer avatar?
- Have you done proper market research?



5. Existing Assets

- Are you bringing the pain?
- Do you have proof to backup your claims?
- Will you be able to fix all of these issues?

6. Strategic Recommendations



- Were your solutions created with the customer avatar in mind?
- Are all recommendations feasible and achievable?
- Did you remedy every pain point from the previous sections?



7. Project Timelines

20-25%

- Do timeline projections have a 20-25% buffer?
- Do you have the service bandwidth to accomplish this project within the timeframe?

8. ROI Projections



- Can you deliver the promised results?
- Are these the most effective and relevant metrics to track?
- Did you give yourself a 20-25% safety net?



9. Investment

- Is the project cost framed as an investment?
- Has your proposal built enough value to justify the price?

10. FAQs



- Do you answer objections before they're raised?
- Did you address all common concerns and objections?
- Do the answers build value in your agency and services?



11. Next Steps

- Did you explain the acceptance process?
- Is your contact information easy to find?

12. Executive Summary



- Does your professionalism shine through?
- Does your agency seem like the perfect solution?
- Did you summarize the pain points?



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