TimeCatchApp

Workflow · Time · Documents · Invoicing

Proposal Checklist

A field guide for building proposals that win the work — and get paid on time.

What's inside

HOW TO USE THIS CHECKLIST

A proposal that pays

Use this as a pre-flight check before you send a proposal to a client. Each section captures the elements that keep scope tight, expectations aligned, and payment predictable. Tick boxes as you draft — anything unchecked at the end is either a deliberate omission or a risk you're accepting.

01 Executive Summary

- [ ] Thank you for the opportunity
- [ ] Point of contact
- [ ] Problem being solved
- [ ] Overview of the solution
- [ ] Benefits of the solution
- [ ] Length of time this proposal is valid without revisions
- [ ] Call to action to start the work

02 Scope of Work

- [ ] Understanding of ask from client — if you have a Request For Proposal, make sure all requests are included (may warrant its own section)
- [ ] Solution methods
- [ ] "Fence" of the work to reduce chance of out-of-scope being requested and not reimbursed
- [ ] List of deliverables
- [ ] How many review cycles of deliverables are allowed (be specific)
- [ ] Optional services that would be useful but not explicitly requested

03 Methodology & Quality

- [ ] Explanation of the methods you will use
- [ ] Processes used to maintain quality of outputs

04 Timelines

- [ ] Kickoff meeting (recommended for most projects)
- [ ] Client-planned meeting schedule

- [ ] Expected timeline for each deliverable
- [ ] What happens to timelines if the client does not provide information you need

05 Budget

- [ ] Pricing model (T&M;, deliverable, unit)
- [ ] Optional models offered if appropriate
- [ ] If T&M;: cap on hours and cost; flag when approaching 80% of total budget
- [ ] If unit-based: cap on units; flag when approaching cap
- [ ] If deliverable-based: define when a delivery is billable (e.g. 70% on first delivery / 30% on final acceptance)

06 Conclusion

- [ ] Why your consulting practice
- [ ] Biosketches of key personnel
- [ ] Length of time this proposal is valid
- [ ] Call to action and signatures for approval

07 Appendix

- [ ] Payment methods (check, ACH, wire)
- [ ] Credit card convenience fee if you accept cards
- [ ] Federal EIN for payments
- [ ] Reference to master agreement if one exists (omit if not)
- [ ] Upfront fee to initiate project (e.g. 30% of total)
- [ ] Kill fees if the project is terminated early
- [ ] Billing period and length of time to pay
- [ ] Pass-through costs if appropriate
- [ ] Work-stop clause for missed payments (use sparingly — annoys clients paying in good faith)

REFERENCE

Comparison of payment structures

Structure	Best For…	Risk Profile
Deliverable, Fixed	Clearly defined projects with a set end date and known scope of work.	High — watch for scope creep. Price so ~60% of the time you're covered. Low risk to client (their cost doesn't depend on your efficiency).
Retainer	Ongoing advisory or support.	Low — paid upfront each month.
T&M	Unpredictable or exploratory work.	Low for you, but these projects often have variable demand. Risk shifts to the client, who can change their mind without breaking the contract.
Unit	Unknown number of well-defined deliverables (e.g. customer call responses).	Moderate — staffing needs are variable. Each unit has a variable cost, so aim to cover ~60% of cases.

⌖ PRO TIP

Signal that you get paid on time.

In your proposal, mention that you use automated invoicing. It signals that your billing process is professional and systematic, which discourages clients from "forgetting" to pay. Don't forget to include the customer logo and contact info for a professional-looking invoice. **TimeCatchApp can generate this for you.**