

HOW TO USE THIS

Industry-specific proposal scaffolds (design, dev, copywriting, consulting, etc). Pick the closest match to your service, then customise the deliverables, timeline, and pricing tiers.

The Industry Proposal Template

A Comprehensive, Fill-in-the-Blank Proposal Framework for Any Freelance Service

By Waco3 — waco3.io

About This Template

This is a complete, 8-section proposal template designed to work for **any freelance industry** — design, development, marketing, consulting, writing, photography, coaching, accounting, legal, or any other service business.

Every section includes:

- Fill-in-the-blank structure with [brackets]
- Example content to guide your writing
- Pro tips for making each section stronger

Estimated time to complete: 30-60 minutes for a new client. 10-15 minutes once you have a saved version with your standard content.

Section 1: Cover Page

[YOUR COMPANY NAME / YOUR NAME]

[Project Name]

Proposal

Prepared for: [Client Name] [Client Company] [Client Email]

Prepared by: [Your Name] [Your Title] [Your Email] [Your Phone]

Date: [Date] **Proposal #:** [PROP-001] **Valid until:** [Date + 30 days]

Confidential — prepared exclusively for [Client Company]

Section 2: Introduction & Understanding

Dear [Client Name],

Thank you for the conversation on [date]. I appreciated learning about [specific thing you learned about their business — e.g., "your vision for expanding the consulting practice into the healthcare vertical" or "the operational bottlenecks your team is experiencing with client onboarding"].

What I heard:

You need [restate their core need in one clear sentence — e.g., "a professional, conversion-focused website that positions your firm as the go-to choice for mid-market manufacturers looking for operational efficiency consulting"].

Specifically, you're dealing with:

1. **[Challenge 1]:** [Description — e.g., "Your current digital presence doesn't reflect the quality of work you deliver to clients, which creates friction in the sales process"]
2. **[Challenge 2]:** [Description — e.g., "Potential clients can't easily understand your methodology or see evidence of results, so they default to competitors with clearer positioning"]
3. **[Challenge 3]:** [Description — e.g., "The manual proposal and quoting process takes your team 3-4 hours per opportunity, limiting the number of deals you can pursue"]

What this costs you:

[Quantify the impact — e.g., "Based on what you shared, these challenges are likely costing \$X in lost opportunities per quarter. Even a conservative improvement would represent significant ROI on this project."]

This proposal outlines how I'd address these challenges, what you'll receive, the timeline, and the investment required.

Pro Tip: This section is the most persuasive part of the proposal. If you nail the "What I heard" summary, the client feels understood — and people hire people who understand them.

Section 3: Approach & Methodology

How I'll Approach [Project Name]

My approach is built on [your methodology or philosophy in one sentence — e.g., "evidence-based design that starts with user research, not assumptions" or "a diagnostic-first consulting model that identifies root causes before prescribing solutions"].

Phase 1: [Name — e.g., "Discovery & Research"]

Duration: [X weeks]

[Describe what happens — e.g., "I'll conduct a thorough analysis of your current state, including:"]

- [Activity 1 — e.g., "Competitive landscape analysis (5 key competitors)"]
- [Activity 2 — e.g., "Stakeholder interviews (3-5 team members)"]
- [Activity 3 — e.g., "Current process audit and documentation"]
- [Activity 4 — e.g., "User/client research (surveys or interviews)"]

You'll receive: [Deliverable — e.g., "A findings report with prioritized recommendations"]

Decision point: [What happens before moving to Phase 2 — e.g., "We'll review findings together and align on direction before any execution begins"]

Phase 2: [Name — e.g., "Strategy & Design"]

Duration: [X weeks]

[Describe what happens]

- [Activity 1]
- [Activity 2]
- [Activity 3]

You'll receive: [Deliverables]

Decision point: [What needs approval before Phase 3]

Phase 3: [Name — e.g., "Execution & Delivery"]

Duration: [X weeks]

[Describe what happens]

- [Activity 1]
- [Activity 2]
- [Activity 3]

You'll receive: [Final deliverables]

Phase 4: [Name — e.g., "Launch & Optimization"] (*optional*)

Duration: [X weeks]

[Describe post-delivery support — e.g., "30-day monitoring period with data-driven adjustments to optimize performance"]

You'll receive: [Post-launch deliverables — e.g., "Performance report with recommendations"]

Why This Approach

[2-3 sentences explaining what makes your process effective — e.g., "Starting with research instead of execution means we build on evidence, not assumptions. The phased structure ensures you have approval gates before significant investment. And the post-launch optimization ensures the work actually delivers results, not just looks good."]

Pro Tip: Name your methodology if you can. "The Evidence-Based Design Process" or "The Diagnostic Consulting Method" sounds more structured than "here's what I'll do." Named processes signal expertise.

Section 4: Scope & Deliverables

What You'll Receive

#	Deliverable	Description	Format
1	[e.g., "Discovery Report"]	[e.g., "Competitive analysis, user research findings, and strategic recommendations"]	[PDF]
2	[e.g., "Wireframes"]	[e.g., "Low-fidelity layouts for 5 key pages showing structure and user flow"]	[Figma]
3	[e.g., "Design Concepts"]	[e.g., "2 visual directions for homepage with style guide"]	[Figma]
4	[e.g., "Final Design"]	[e.g., "Complete designs for all pages in the selected direction"]	[Figma]
5	[e.g., "Development"]	[e.g., "Fully responsive, CMS-powered website with all integrations"]	[Live URL]
6	[e.g., "Documentation"]	[e.g., "CMS user guide, style reference, and maintenance notes"]	[PDF + Video]

What's Included

- [Specific inclusion 1 — e.g., "Up to 5 page templates"]
- [Specific inclusion 2 — e.g., "Mobile and tablet responsive design"]
- [Specific inclusion 3 — e.g., "Contact form with email notifications"]
- [Specific inclusion 4 — e.g., "Basic SEO setup (meta tags, sitemap, page speed optimization)"]
- [Specific inclusion 5 — e.g., "2 rounds of revisions per deliverable"]

What's Not Included

- [Exclusion 1 — e.g., "Copywriting (client provides final content)"]
- [Exclusion 2 — e.g., "Custom photography (stock images included)"]
- [Exclusion 3 — e.g., "Ongoing maintenance after 30-day support period"]
- [Exclusion 4 — e.g., "Third-party integrations beyond those specified"]

Revision Policy

Each deliverable includes **[2]** rounds of revisions. A revision is defined as [your definition — e.g., "adjustments to an existing approved direction, not a new direction entirely"]. Additional revisions are available at **[\$[X]/hour]**.

Pro Tip: The "Not Included" section isn't negative — it's protective. It prevents the most common source of freelancer frustration: "Can you also just quickly..." requests that double the project scope.

Section 5: Timeline

Project Schedule

Week	Phase	Key Activities	Your Input Needed
1-2	[Phase 1]	[Activities]	[e.g., "Provide access to analytics, introduce us to 3 clients for interviews"]
3	Review	[Findings presentation]	[e.g., "Attend 60-min review, approve direction"]
4-5	[Phase 2]	[Activities]	[e.g., "Review wireframes by end of Week 4, select design direction by end of Week 5"]
6-7	[Phase 3]	[Activities]	[e.g., "Deliver final content, review staging site"]
8	Launch	[Go-live activities]	[e.g., "Final approval, DNS access"]
9-12	[Phase 4]	[Post-launch]	[e.g., "None — weekly update emails"]

Total duration: [X] weeks from kickoff to launch

Important: This timeline assumes client feedback is provided within **[3] business days** of each deliverable. Delays in feedback shift subsequent phases by the same duration.

Section 6: Investment

Pricing Options

I've structured three options so you can choose the scope that fits your needs and budget:

Option A: Essential

[\$[X,XXX]

Best for: [Who this option is for — e.g., "Teams that need core functionality without extras"]

Includes:

- [Deliverable 1]
- [Deliverable 2]
- [Deliverable 3]

Does not include: [Key thing missing — e.g., "Post-launch optimization, custom integrations"]

Option B: Standard *(Recommended)*

[\$[X,XXX]

Best for: [Who this is for — e.g., "Most clients who want the full scope with measurable results"]

Everything in Essential, plus:

- [Additional deliverable 1]
 - [Additional deliverable 2]
 - [Additional deliverable 3]
-

Option C: Premium

[\$[X,XXX]

Best for: [Who this is for — e.g., "Teams that want everything handled, including ongoing support"]

Everything in Standard, plus:

- [Premium addition 1]
 - [Premium addition 2]
 - [Premium addition 3]
-

Payment Schedule

Milestone	Percentage	Amount	Due
Project kickoff	[40-50%]	[\$[X,XXX]	Upon acceptance
[Mid-project milestone]	[25-30%]	[\$[X,XXX]	[e.g., "Upon design approval"]
Final delivery	[25-30%]	[\$[X,XXX]	[e.g., "Upon launch"]

Accepted payment methods: [Bank transfer, credit card, PayPal, etc.]

Early payment discount: [Optional — e.g., "5% discount for full payment upfront"]

Pro Tip: The middle option (Standard) should be your ideal project scope. Most clients choose it. Essential makes Standard look like a great deal. Premium makes Standard feel responsible.

Section 7: Why [Your Name / Company]

Why Work With Me

[This is NOT a resume. It's proof that you can deliver on the promises above. Keep it short and relevant.]

Relevant Experience

Project	Client Type	Result
[Similar project 1]	[Industry/type]	[Specific outcome — e.g., "45% increase in qualified leads"]
[Similar project 2]	[Industry/type]	[Specific outcome]
[Similar project 3]	[Industry/type]	[Specific outcome]

What Clients Say

"[Testimonial quote — specific, with a measurable result if possible]" — [Client Name], [Role], [Company]

"[Second testimonial]" — [Client Name], [Role], [Company]

The Short Version

[2-3 sentences about why you're the right fit for THIS project specifically — e.g., "I've spent 8 years working exclusively with professional services firms on their digital presence. I understand that your

website isn't a brochure — it's your most important business development tool. That perspective shapes every design decision."]

Section 8: Terms & Next Steps

Terms

- **Validity:** This proposal is valid for **30 days** from [date]. After this date, pricing and availability may change.
 - **Revisions:** [X] rounds per deliverable included. Additional at \$[X]/hour.
 - **Cancellation:** Either party may cancel with [X days] written notice. Work completed to date will be invoiced at the agreed project rate, prorated.
 - **Intellectual property:** All final deliverables become your property upon full payment. Work-in-progress and source files remain mine until final payment is received.
 - **Confidentiality:** I will not share your business information, strategy, or project details with third parties without your written consent.
 - **Third-party costs:** [If applicable — e.g., "Hosting, domain registration, stock photography, and third-party software licenses are the client's responsibility and are not included in the pricing above."]
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How to Accept

Step 1: Reply to this email with: *"I'd like to proceed with [Essential / Standard / Premium]"*

Step 2: I'll send a deposit invoice within 24 hours.

Step 3: Upon deposit receipt, I'll send a kickoff questionnaire and we'll schedule our first call.

Proposed kickoff date: [Suggest a specific date — e.g., "Week of May 5, 2026"]

Questions?

I'm happy to walk through any section of this proposal:

- **Email:** [your@email.com]
- **Phone:** [your phone number]
- **Schedule a call:** [scheduling link if you have one]

[Your Name] [Title / Company] [Website]

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