



PROPOSED

THE EVENT MANAGER'S GUIDE TO WRITING A PERFECT
EVENT PROPOSAL

An A-Z template to effectively introduce your company, culture, and services, and make a powerful first impression on any client.



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PROJECT PROPOSAL

Project Name:

[name]

Event Date:

[date]

Prepared for:

[contact name]
[company name]
[address]

Prepared by:

[Your Business Name]
[Address]
[Phone Number/Email Address]

[Date]

[Version #]

WHO WE ARE

There are many event companies.
Why choose us?

REASON 1

This is the backbone of your company. It's why you got into the game, it's your philosophy, your creed, the reason you get up every morning and do this work. If you get nothing else across to your potential client, make sure this is heard loud and clear.

REASON 2

Clients have goals in mind – this is where your research about their companies, past events, and aesthetic starts to come into play. Keep it subtle – no reason to pound them over the head with how much you know. Focus on a specialty of your company that lines up nicely with their needs.

REASON 3

Time to close the deal. Yes, right here on the third page (counting your glossy cover sheet). Talk about your process and what A-level planning they can expect from awarding you this job. Leave them feeling confident about your ability to execute and interested enough to read on. Now you've got them hooked!

PROJECT OVERVIEW

What guides our choices.

ESSENTIALS

Event Date:

[date]

Venue:

[name]

[address]

AUDIENCE

What do you know about the attendees? Share it here. Demographics, relationship to client and company, etc.

CONCEPT

What is the client's vision and how do you intend to execute it? Clearly communicate your idea or rough plan for the event.

GOALS

1. There could be many but this is the most important and may have already been given to you by the client (e.g. # Leads, %ROE, etc.) This event could be considered a success if this goal is achieved.
2. The next best thing. Is the client seeking brand awareness? Showcasing a new product? Let them know you're on board.
3. Try to limit this goal section to three at most. These are high level, overarching efforts. They'll be plenty of little milestones along the way. You're still big picture here.

SERVICES

What we do for you.

PHASE 1: RESEARCH

Explain your requirement gathering process. Tell the client who's involved, what resources you'll bring to bear, and what elements will help you deliver the event of his or her dreams.

PHASE 2: PLAN

Give the client some insight into how you pull all of the logistics together. Include him or her in your planning by noting regular status meetings, walkthroughs, or approvals. This event is your client's baby. Don't just take it and walk out of the room!

PHASE 3: EXECUTE

Show time! Share how you run a site on the day of an event. Talk about your team, how you'll handle all of the moving pieces, who'll be in charge, and what you'll do to ensure a seamless process.

ELEMENTS

All the parts and pieces of your event.

Freestyle!!!! This is always going to be different, so make it special. Include links to a design portfolio or list of set pieces. [Embed a PowerPoint](#) or Slide deck that let's the client quickly scroll through and get a visual sense of the event.

BE CREATIVE!

[insert Slide Show here]

PERSONNEL

The people who make it happen.



Your awesome team member bio goes here! Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit.



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Your awesome team member bio goes here! Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit.

EQUIPMENT

What we need to build it.

Use this section to explain [your requirements](#). If you've got a lot of gear to order, [link to an inventory order](#) to give the client a sense of the scope.

ASSUMPTIONS

The things we didn't know for sure...

Every proposal is built on the back of a few assumptions. You simply aren't going to have enough concrete information about the scope this early in the process! Be upfront with the client. Use this space to share some of the assumptions you've made that helped craft your proposal. Give the client the opportunity to confirm or correct if necessary. You don't want the client making his or her OWN assumptions that you don't have a handle on the purpose of the event.

PRELIMINARY SCHEDULE

What we already know: milestones,
markers, etc.

You'll obviously know the event date. But what else? You've probably been able to scope initial phases of the project based on the size of the event and the people involved. As much as you can get into an early schedule, the better. It confers to the client your forethought and potential ability to handle changes.

NEXT STEPS

How we move forward.

Lay out for your client how to proceed once you've submitted your proposal. Use the example text below as a reference.

Once services are agreed upon, a few things will happen.

1. A deposit invoice will be issued along with standard paperwork.
2. We will send a contract via email to the address we have on file. Please review and upon approval, sign and return by email, post, or fax. Once all parties have signed, the Executed Agreement will be forwarded to all parties by preferred delivery method and we'll get right to work.

Deposit & Signed Contract Due Date: [insert date]

Final Balance Due Date: [insert date]

New clients may be required to fill out and fax back a credit card authorization form. New clients are not required to pay by credit card but we must have one on file. Any past-due balances will be charged to the card before work can begin. Additional charges will be invoiced at the job's completion.

This estimate is valid for 7 Days from the date of issue.

We look forward to working with you.