

# Writing Winning Proposals — Workbook

This workbook is your hands-on companion to the Writing Winning Proposals course. Each section corresponds to a module and gives you exercises, worksheets, and checklists to apply what you learned to a real client opportunity. Work through the sections in order, ideally while a live proposal is in progress.

## Discovery — Preparing to Write

Before a single word of the proposal is written, this section ensures you have the information you need to make it specific, relevant, and compelling.

### Exercise: Discovery Call Debrief

Immediately after your next discovery call, set a 10-minute timer and answer the following prompts from memory. Do not consult your notes first — this tests what actually stuck.

- In one sentence, what is the client's core problem as they described it — using their exact words as much as possible?  
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- What has the problem cost them — in time, money, missed opportunity, or stress? Be specific about any numbers they mentioned.  
\_\_\_\_\_
- What did the client say a successful outcome looks like? What would be different in their business or work?  
\_\_\_\_\_
- Was there anything unclear or missing from the conversation that you need to follow up on before writing the proposal?  
\_\_\_\_\_

### Worksheet: Proposal Brief

Complete every field before opening your proposal document. If a field is blank, send a follow-up email to the client before proceeding. A complete brief means a faster, better proposal.

Client company name  
\_\_\_\_\_

Primary decision-maker name and title  
\_\_\_\_\_

Other stakeholders involved in the decision  
\_\_\_\_\_

The client's core problem in their own words  
\_\_\_\_\_

What they have already tried and why it fell short  
\_\_\_\_\_

Specific cost of the problem continuing (time, money, missed opportunity)  
\_\_\_\_\_

What a successful outcome looks like in their words  
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Hard deadline or preferred start date

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Budget range signaled (direct or implied)

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Competing options or providers they are considering

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Open questions to resolve before writing

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### Checklist: Discovery Call Readiness

- Send a one-paragraph pre-call summary to the client outlining what you will cover
- Block 30 to 45 minutes and protect the first and last five minutes for rapport and next steps
- Prepare the six core discovery questions and print or pin them for reference
- Have a notebook or open document ready for verbatim quotes from the client
- After the call, send a follow-up email within 24 hours with any clarifying questions
- Complete the proposal brief before opening the proposal document

## Structure — Building Your Proposal

Use this section to plan and review each section of your proposal before you send it — ensuring the flow takes the client from problem recognition to clear decision.

### Exercise: Section One Draft — Understanding Your Situation

Write the opening section of your proposal using only information from your discovery brief. Do not start with your credentials or a general introduction. Start with the client's problem. Aim for two to three paragraphs.

- Write the first paragraph: name the specific problem the client is facing and why it matters to their business.
- Write the second paragraph: describe the cost of the problem continuing — use the numbers or language they gave you.
- Write the third paragraph: state what the client told you a successful outcome looks like. Make it specific enough that they read it and think: yes, that is exactly what we want.

### Worksheet: Proposal Section Planner

Map out the content for each of the five proposal sections before writing. This planning pass prevents blank-page paralysis and keeps each section focused.

Section 1 — Understanding Your Situation: key points to include

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Section 2 — What We Will Do Together: approach summary in 1-2 sentences

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Section 3 — Scope and Deliverables: list each deliverable by name

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Section 3 — Out-of-scope items to name explicitly

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Section 3 — Client inputs or approvals required

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Section 4 — Investment: names and price points for each option

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Section 4 — Value anchor statement (cost of inaction to include before pricing)

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Section 5 — Next steps: numbered list of what happens after yes

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Section 5 — Proposal expiry date

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Credentials section: most relevant case study or testimonial to include

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### Checklist: Proposal Quality Review

- The first section opens with the client's problem, not your credentials or company history
- The client's own language or phrasing appears at least once in Section 1
- Every deliverable in the scope section is named specifically, not described in a category
- The number of revision rounds is stated for each deliverable
- Out-of-scope items are listed explicitly
- The change order clause appears in the scope section
- Value context (cost of inaction or outcome value) appears before the price
- The Recommended pricing option is visually distinct
- Next steps are numbered and tell the client exactly what happens after they say yes
- A proposal expiry date is included
- The proposal is between three and six pages

### Exercise: Credentials Placement Test

Most freelancers put credentials at the front. Read your draft proposal and answer the prompts below to test whether your credentials are positioned to land.

- Where do your credentials currently appear in the proposal — which section and how early?
  - Does your credentials section reference a case study that matches this client's industry or problem type? If not, which case study would be most relevant?
  - Rewrite your credentials paragraph to open with the type of client or challenge you are most experienced with, rather than with your own name or company history.
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## Pricing and Scope — Packaging Your Offer

This section helps you build and pressure-test your pricing tiers before sending, and ensures your scope language will protect you if the project expands.

### Worksheet: Three-Option Pricing Builder

Complete this worksheet for your current proposal. Build the Recommended option first, then derive the Essential and Premium options from it. Every field should be specific — avoid vague feature descriptions.

Option 1 name (outcome-based, not tier-based)

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Option 1 — who this is best for (one sentence)

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Option 1 — deliverables included (list each by name)

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Option 1 — price

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Option 2 name — Recommended

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Option 2 — who this is best for

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Option 2 — deliverables included

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Option 2 — price

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Option 3 name (premium)

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Option 3 — who this is best for

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Option 3 — deliverables included and what is added vs Option 2

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Option 3 — price

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Value anchor: what does solving this problem save or earn the client? Include the number.

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### Exercise: Scope Stress Test

Before sending, stress-test your scope section by imagining three common ways projects expand. For each scenario, check whether your current scope language would protect you or leave you exposed.

- A client asks for an additional deliverable not listed in the scope, claiming it was implied in the original discussion. Does your scope section clearly exclude it? What specific language would you add?
- The project runs two weeks longer than expected because the client delayed providing required inputs. Does your scope section note the client inputs required and what happens if they are delayed? If not, write that clause now.
- The client asks for three additional rounds of revisions beyond those included. Does your scope section state the number of revisions included? What is your change order rate for additional rounds?

### Checklist: Pricing and Scope Readiness

- Each pricing option has a name that describes the outcome or scope, not the tier level
- The Recommended option is marked visually and includes a one-sentence description of who it suits
- A value anchor statement appears before the pricing options
- Each option lists deliverables individually, not in vague categories
- The out-of-scope list is explicit and includes at least three specific exclusions
- Client inputs required are named and linked to specific deliverables
- The change order clause is present and written in plain language
- The scope section states the number of revision rounds included for each deliverable

## Objections and Follow-Up — Closing the Deal

Use this section to prepare your objection responses before you send the proposal and to build your follow-up sequence so it is ready to deploy the moment the proposal lands in the client's inbox.

### Exercise: Objection Preparation

For each of the five common objections, write your specific response for this particular proposal and client. Generic responses are less effective than ones calibrated to the client's situation.

- This is more than we budgeted for: What is your Essential option price point? Write a two-sentence response that pivots to scope reduction rather than rate reduction.

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- We need to think about it: Write a single clarifying question that surfaces whether the hesitation is about price, timing, internal approval, or something else.

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- We are comparing a few options: Based on what you learned in discovery, what one or two factors matter most to this client? Write a response that positions your strengths against those specific factors.

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- We would like to revisit this next quarter: Write a response that keeps the relationship warm and sets a specific date for follow-up, without sounding desperate.

### Worksheet: Follow-Up Sequence Planner

Write all three follow-up messages before you send the proposal. Having them ready means you will actually send them on schedule instead of procrastinating when the silence sets in.

Proposal sent date

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Day 3 follow-up date

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Day 3 message — value add: what resource, insight, or article will you share? Why is it relevant to their situation?

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Day 3 message — draft subject line

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Day 3 message — two-sentence body draft

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Day 7 follow-up date

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Day 7 message — direct question: what one question will surface the real sticking point?

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Day 7 message — draft subject line and one-sentence body

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Day 14 follow-up date

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Day 14 message — soft close: what is your next available start date? Draft the one-paragraph message.

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Closing email — draft a gracious two-sentence close for if there is still no response after Day 14

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## Worksheet: Post-Proposal Review

Complete this worksheet within 48 hours of every proposal outcome — win or loss. The data you collect here is the most valuable input you have for improving your next proposal.

Client name and proposal date

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Outcome: won, lost, or no decision

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If lost or no decision — what reason did the client give, if any?

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What information did you wish you had before writing this proposal?

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Which section of the proposal got the most attention or response — positive or negative?

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Which pricing option did the client choose, or which did they push back on?

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What objection came up and how did you respond? Was it effective?

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One thing you would do differently next time

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One thing that worked well and should be carried forward

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## Checklist: Proposal Pipeline Habits

- Every proposal sent is logged with client name, date, scope, price, and recommended tier
- All three follow-up messages are drafted before the proposal is sent
- Follow-up dates are added to your calendar or task manager immediately
- A post-proposal review is completed within 48 hours of every outcome
- Won proposals are saved to a personal template library with client details anonymized
- After every 10 proposals, review the log and identify one pattern to act on
- Clients who said no or not now are added to a future follow-up list with a 90-day check-in date

## Your Action Plan

1. Schedule your next discovery call and send the client a one-paragraph pre-call summary before it happens
2. Print or pin the six core discovery questions and use them on your next call
3. Complete the proposal brief worksheet within one hour of every discovery call, while the conversation is fresh
4. Build your three pricing options using the worksheet in Section 3 — starting with your Recommended option
5. Write your scope section and stress-test it using the three scenarios in the Section 3 exercise before sending
6. Draft all three follow-up messages and set calendar reminders for Day 3, Day 7, and Day 14 before the proposal leaves your outbox
7. Prepare your objection responses for the five common objections before you click send — not after you receive a pushback email

8. Log every proposal you send in your tracker with date, scope, price, and recommended tier
9. Complete a post-proposal review within 48 hours of every outcome and save the notes
10. After 10 tracked proposals, review your win rate by tier and adjust your Recommended option if needed













