

CLIENT-FACING TEMPLATE

WordPress Project Proposal Template

The proposal structure that gets signed: the client's problem first, the price without apology, and a scope boundary you can point at in month three.

Most developer proposals are a feature list with a number at the bottom. They lose to cheaper quotes because nothing in them explains why the work costs what it costs. This template leads with the client's problem, prices outcomes instead of hours, and states what is out of scope while it is still cheap to say so.

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How to use this template

A proposal is a sales document, not a specification. Its only job is to make saying yes feel like the low-risk choice.

- 1 **Write the problem section last but put it first.** The client should read your summary of their situation and think: they actually listened.
- 2 **Never send a proposal before a discovery call.** A proposal written from a form submission is a quote, and quotes compete on price alone.
- 3 **Price the outcome, not the hours.** Hourly pricing invites the client to audit your speed. Fixed scope with a fixed price makes them audit the result instead.
- 4 **Give three options where you can.** Most clients pick the middle one. Without a comparison, your single price has nothing to be reasonable against.
- 5 **State exclusions plainly.** Every line in your exclusions list is an argument you will not have to win later.
- 6 **Put an expiry date on it.** Proposals without a deadline stay open forever and get used to shop your price around.

THE SECTION PEOPLE DELETE FIRST

Do not delete **Assumptions and change control**. It is the least exciting page and the only one that protects your margin. When a client asks for something outside scope in week six, this page is the difference between a change order and an awkward conversation you lose.

Delete these before sending

- Any section that does not apply to this client. A tight 6-page proposal beats a padded 14-page one.
- Every instruction box, including this page.
- The word 'we' where 'you' would do. Count them. The client should appear more often than you do.

Cover and executive summary

PREPARED FOR Client name	PREPARED BY Your name	VALID UNTIL Date
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Executive summary

Write four sentences, in this order. Nothing else goes on this page.

SENTENCE	WHAT IT MUST DO	YOUR VERSION
1	Name the client's problem in their words	
2	State what it is costing them, in money or time	
3	Say what you will build and the outcome it produces	
4	State the investment and the timeline	

THE TEST

If the client read only this page and nothing else, could they decide? If not, the summary is describing your work instead of their result.

Recommended option at a glance

INVESTMENT

TIMELINE

START DATE

The problem and what it costs

Reflect the discovery call back at them. Specifics you could only know by listening are what separates you from the three other proposals on their desk.

1.1 What we heard

IN THE CLIENT'S OWN WORDS, QUOTED WHERE POSSIBLE

1.2 What it is costing

SYMPTOM	BUSINESS IMPACT	ESTIMATED COST PER MONTH

WHERE THE PRICE GETS JUSTIFIED

This table is why the client accepts your number. A project priced at 5,000 against a stated 3,000 per month of lost revenue is an easy yes. The same project with no cost of inaction is just an expense.

Use the client's own figures wherever you have them. Your estimate of their loss is arguable. Their estimate is not.

1.3 What happens if nothing changes

ONE SHORT PARAGRAPH, NO DRAMA

Proposed approach

Explain the shape of the work and, more importantly, why this shape rather than the obvious alternative. Clients pay for judgement, and this is the only page where yours is visible.

2.1 The approach

TWO OR THREE PARAGRAPHS

2.2 Why not the alternative

OPTION CONSIDERED	WHY IT IS NOT THE RECOMMENDATION

THIS PAGE WINS COMPETITIVE PITCHES

Naming an approach you rejected, and why, signals that you evaluated the problem rather than reaching for your default stack. Very few proposals do it.

Scope, deliverables, exclusions

3.1 Deliverables

#	DELIVERABLE	DESCRIPTION	ACCEPTED WHEN

3.2 Explicitly out of scope

- ☐ Content writing, editing, or migration of existing copy
- ☐ Photography, illustration, or licensed stock imagery
- ☐ Third-party plugin or SaaS licence fees
- ☐ Ongoing hosting, maintenance, backups, and security monitoring
- ☐ Search rankings, ad management, or campaign work
- ☐ Training beyond the number handover sessions listed in 3.1
- ☐ Add anything this client has already hinted at wanting for free

SAY THE QUIET ONE OUT LOUD

If a client mentioned something in passing during discovery that is not in your price, it belongs in this list by name. 'I assumed that was included' is the most expensive sentence in client work.

Timeline and milestones

Tie every date to a client dependency. A timeline that only lists your work implies that delays are always your fault.

MILESTONE	DELIVERABLE	WEEK	NEEDS FROM CLIENT
Kickoff			
Discovery complete			
Design approved			
Build complete			
Review and revisions			
Launch			

TIMELINE CONDITIONS

Dates assume feedback within 3 business days at each review point, and that all client-supplied material arrives by date. Delays in either shift subsequent milestones by the same number of days.

Investment and payment terms

5.1 Options

	ESSENTIAL	RECOMMENDED	COMPLETE
What it covers			
Best for			
Timeline			
Investment			

WHY THREE OPTIONS

A single price is a yes-or-no decision. Three prices change the question from 'should we do this' to 'which one', and most clients choose the middle. Make the middle the one you actually want to sell.

5.2 Payment schedule

STAGE	PERCENTAGE	AMOUNT	DUE
On acceptance, before work begins	<u>40%</u>		
At design approval	<u>30%</u>		
Before launch	<u>30%</u>		

- Invoices are payable within 14 days. Work pauses on overdue accounts.
- Late payment carries interest at rate percent per month.
- All prices exclude VAT / GST / sales tax.

What we need from you

Projects rarely slip because the developer is slow. They slip because logins, copy, and decisions arrive late. Naming this up front makes it a shared commitment.

WHAT WE NEED	NEEDED BY	OWNER	RECEIVED
Hosting and domain access			
WordPress admin credentials			
Brand assets, logo files, fonts			
Final copy for all pages			
Named decision-maker for approvals			
Analytics and search console access			

ONE DECISION-MAKER

Ask for a single named approver. Design by committee is the most reliable way to turn a six-week project into a four-month one, and it never shows up in a quote.

Assumptions and change control

7.1 This proposal assumes

- The site runs on hosting environment with PHP version available.
- Existing content is migrated as-is, without rewriting or restructuring.
- Number rounds of revision are included at each review point. Further rounds are billed at rate.
- Third-party integrations behave as documented by their vendors.
- The client holds valid licences for all commercial plugins and themes required.

7.2 Change control

Anything outside the deliverables in section 3 is handled as a change request. We will price it in writing before starting, and you decide whether to proceed. Nothing outside this proposal gets built or billed without your written approval.

CHANGE REQUEST RATE

MINIMUM BILLABLE INCREMENT

Hourly or per-item

SAY THIS OUT LOUD ON THE CALL

Change control reads as bureaucratic until you frame it as protection for the client's budget: nothing gets built or billed that they did not approve in writing.

Acceptance

To proceed, sign below and return this page. We will issue the first invoice and confirm your start date within 2 business days.

OPTION SELECTED

Essential / Recommended / Complete

AGREED START DATE

TOTAL INVESTMENT

PROPOSAL VALID UNTIL

CLIENT

SUPPLIER

Signature

Signature

Printed name

Printed name

Title

Title

Date

Date

THIS PAGE IS NOT A CONTRACT

Acceptance confirms scope and price. The terms that govern the work, including intellectual property, liability, and termination, live in a separate development agreement. Send both together.

We build the systems behind the paperwork

Gatilab is an independent WordPress and search agency. We build sites, rank them, and stay long enough to prove the work moved something.

2014 Founded	850+ Clients served	2,000+ Projects completed	10,000+ Plugin installs
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What we do

WordPress engineering

Custom themes, blocks, plugins, and migrations built to stay fast and maintainable after handoff.

SEO strategy

Technical fixes, topical coverage, and search visibility work measured against clicks, not scores.

Content marketing

Research-led articles and editorial systems your team can keep publishing without us.

Conversion design

Landing pages, service pages, and forms designed around the decision the reader is actually making.

Need this handled instead of templated?

Send the problem, not a brief. We will tell you whether it is worth building, what it depends on, and what we would deliberately skip. If the honest answer is that you do not need us, you will get that too.

[Start a project](#)

gatilab.com/connect

USE IT FREELY

Free to use, edit, and adapt for your own business and your own clients. No attribution required, no sign-up. The one thing we ask: do not resell it as your own product.