

# Proposal Checklist

## USER GUIDE

Clients often engage us to help them prepare a proposal. The proposal may be to win a contract, make a tender bid, or raise money for an entertainment industry, technology or entrepreneurial venture.

This proposal checklist is designed to help improve the chances of acceptance for a proposal. It cites examples from proposals for entertainment, technology and general business proposals. Not all elements will apply to all types of proposals.

**Graphic design and artwork** A professionally presented proposal will work in your favour.

**Project Name** Perhaps suggest some alternative project titles or working titles.

**Contents** A list of contents makes reading the proposal so much easier.

**Project Snapshot** This should comprise very short paragraphs with topic headings such as - focus, objectives and budget.

**Executive Summary** Adding this may be useful.

**Description** Describe the product, its elements, type, length, message, entertainment value and other characteristics. Give the reason for making the production. Why is it needed or different? Up to what stage is the project developed - one or two pages will usually suffice. Why should it be made? Is there a possible sequel or on-running series?

**Synopsis** For a business, technology or film project a one page "selling synopsis" can be very useful. For a film project it could include some content or story elements. Film projects typically involve several separate script documents at a number of levels, ie a synopsis (maybe one paragraph and one sentence versions), an outline, a treatment and a script.

**Market Research** Conduct extensive market research and review the data thoroughly to produce accurate, insightful and helpful information for the target readers. Successful products of a similar genre may make a good comparison. Third party assessments (eg technology test results and readers reports) of the project may be useful. What market sector is being targeted given the product's standard eg censorship rating?

**Marketing Proposal** Perhaps include ideas on the marketing campaign, advertising copy, ideal release time and pattern, and preferred distribution channels.

**Specifications** These are vital in many transactions. Where appropriate they can be split into technical and functional specifications. In the software development context, functional specifications are a statement of what functions a software program is to perform. For functional specifications consider adding the project's aim, target users, approach, key visual metaphors, components of the content for interactivity, processes to be followed for such interaction, and rewards/insights to be derived from such interaction. In a film and television drama character descriptions could form part of the project's specs.

**Title to Property** Set out evidence of the production entity's legal right to use key assets, eg the brand name for the product, the patent for a technology, or the story on which a documentary is to be based.

**Finance** Include a budget summary. Point out any deferrals of salaries or loan repayments or other items which affect the deal. Set out reference to any commitment or interest from prospective distributors of the product. Provide a revenue projection by estimating the potential revenue and provide a timetable showing the expected pattern of return from all possible sources. Any pre-sales or discussions with potential buyers? Any money committed so far? Any government support or involvement? Order of recoupment of percentage of profits. Have any parties put in development funds so far, and if so, who and how much and on what basis? Are there any tax advantages, and if so, is there an accountant's/lawyer's advice which can be included in the proposal? Consider the production organisation's needs for cash flow.

**Production Schedule** Show start dates and delivery dates.

**People Profiles** Short biographies and perhaps photographs, especially if they are known to the reader. If appropriate add expressions of interest from prospective team members.

**Organisational Profile** Emphasise the successes and personnel involved in your organisation's profile.

**Source Material & Product Style** Give details of the source material to be used in the proposed project, eg testimonials and information regarding sales or critical acclaim. It is always useful to provide competitive intelligence. Also consider providing complementary copies of a relevant manual, book, record, video or software.

**Personnel or Credits** Details of the project's owner, leadership team, producer, programmer, interface designer, art director, writer etc. Depending on the need include their affiliations, short biographies, profiles or resumes.

**Insurer** Provide name and contact details, if any. For a film project the name of the completion guarantor will also provide assurance to readers.

**Banker** Provide name and contact details, if any.

**Professional Advisers** Provide name and contact details of the production entity's auditor, lawyers and accountants.

**Contact** Set out details on how readers can contact you.

**Legal Protection** Discuss your proposal with us for advice on how best to protect it and underlying assets. We have considerable expertise in preparing disclaimers, legal notices and other mechanisms for business legal risk reduction and asset protection.

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