



SALES AND FINANCE

Proposal scope checklist

A pre-send checklist for making proposals specific enough to support a confident yes and a clean project start.

A practical worksheet from Stelaah

Use it, adapt it, and save it with the client work it supports.

HOW TO USE THIS

You are about to send a proposal for client work.

WORK THROUGH THE CHECKLIST

- ☐ 01 **Define deliverables**

- ☐ 02 **List exclusions**

- ☐ 03 **Set milestones**

- ☐ 04 **Name assumptions**

- ☐ 05 **Confirm payment terms**

- ☐ 06 **State acceptance and next steps**

Before you close this

Name one owner, one next action, and one date. A worksheet only helps when the next commitment is visible to the people doing the work.

Notes and decisions

Use this page to record what changes after you work through the checklist.

This practical workflow resource is not legal, financial, tax, or security advice. Adapt it to your team and circumstances.