Software project proposal outline

From the free scoping kit by Netling Digital. Guide: How to Scope a Client Software Project. File > Make a copy to edit. Text in [brackets] is for you to fill in.

Keep it short enough to read in ten minutes. The client should recognise their own words on the first page.

1. **Your goal, in your words.** Two or three sentences from the confirmed recap.
2. **What we'll build in version 1.** Modules and must-have features. **Not included:** [an explicit list. It prevents more disputes than the feature list.]
3. **How we'll build it.** Phases or milestones, what you'll see at each one, and how feedback and sign-off work.
4. **Assumptions.** Copied from the scoping sheet. Each one is something we're relying on from your side.
5. **Team and timeline.** Who works on it, a realistic timeline, and what we need from you and when (content, designs, access, feedback times).
6. **Price and engagement model.** A fixed price for a well-defined scope, or time and materials with an estimate range and a monthly cap. Payments tied to milestones.
7. **Changes to scope.** How a change is raised (in writing, by either side), how we estimate it (hours, price and the effect on the launch date, within [n] working days), who approves it on your side, and that nothing outside the agreed scope starts until it's approved in writing. Approved changes adjust the price and the date.
8. **After launch.** Warranty period, support and hosting options, a retainer if relevant.
9. **Proof.** One or two similar projects, and a reference you can speak to if possible.
10. **Next step.** How to accept, when work can start, and the decision date we agreed.

Legal terms (IP, confidentiality, liability) go in a separate agreement or an appendix.

Presenting it

Book a 30-minute walk-through with the decision-maker present. Start with their goal and version 1, not the price. Say the assumptions out loud. If the price is a stretch, change the scope, not the rate. Agree a decision date before you hang up. The two follow-up emails are in template 3.