FolarraStudio

Proposal Tracker

write · send · win

PRINTABLE · PROPOSALS, DEADLINES & WINS

This Tracker Belongs To

for freelancers, agencies and grant writers

BUSINESS NAME _____

OWNER _____

PHONE / EMAIL _____

SERVICE AREA _____

STARTED ON _____

How to use this tracker

- Print the whole planner once, then print extra copies of the pages you use most, such as the Planner and Tracker pages.
- Print at 100% / Actual size on A4 or US Letter paper. The printable pages have a white background to save ink.
- Hole-punch the pages and keep them in a binder, so you can add pages any time.
- Every page is undated, so you can start in any month of any year.
- Plan each proposal on one page, log it when sent and review your win rate monthly.
- Digital planner: open the hyperlinked PDF in any PDF annotation app and tap the tabs to jump between sections.

Our word for this year

Why good records matter

Contents

tap a title in the digital planner to jump to it

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Proposal Planner

one proposal per page

CLIENT _____ DUE _____

VALUE _____ DECISION BY _____

Their problem

My solution

Sections

- [ ]
- [ ]
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Attachments

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Proposal Tracker

every proposal

DATE	CLIENT	PROJECT	VALUE	STATUS	WON
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Deadline Calendar

never miss one

DUE	PROPOSAL	DRAFT	REVIEW	SENT
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		☐	☐	☐
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		☐	☐	☐

Content Library

reuse your best writing

SECTION	WHERE SAVED	LAST USED	NOTES

Win Rate

by month

YEAR _____ GOAL _____

MONTH	SENT	WON	VALUE WON	RATE
Jan				
Feb				
Mar				
Apr				
May				
Jun				
Jul				
Aug				
Sep				
Oct				
Nov				
Dec				
Total				

Notes



FolarraStudio

Thank you!

Thank you for choosing FolarraStudio. I hope this tracker makes everyday life a little calmer and more organized. If you enjoy it, tell a friend about folarrastudio.com.

Terms of use

- For personal use. You may print as many copies as you need for yourself and your family.
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- Colors may look slightly different on screen and on paper.
- Questions or ideas? Write to me through folarrastudio.com, I am happy to help.

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