

Proposal Page and Document Design CheatSheet



- Understand the software that you are working with
- Make sure that everything you are using is up to date
- Make a template to make sure you are consistent throughout your work
- Outline all the template specifications [Margins, font family, header and footer style]
- Outline different types of textual information [Body text, testimonials, headings]
- Make sure you understand all the customer requirements
- Choose logical and appropriate colours
- Explain how graphs are to be incorporated—if needed [Incorporate graphs after referenced in the text]
- Make special templates if necessary for specific information; this includes Q&A's, summaries, and resumes
- Templates should always be made with the users skill level in mind
- Documents should be separated logically by sections and volumes and allow for reformatting
- Review large documents additionally
- Track progress overtime and make improvements
- Make the text easy to understand including a variety of colourful visuals
- Put the most important information in the top left of the page and include a visual element
- Create contrast on the page with different sized elements and colours
- Keep similar concepts close together
- Don't overload a page, keep it balanced with white space
- Keep page styles consistent to avoid confusion
- Train your team and stay up to date on software/application trends; don't expect teammates to understand how a piece of software works simply because it is on their computer.