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Proposals, pricing and scope for client work

Turn 'can you build me something?' into a clear proposal: discovery questions, scope, price, timeline and what happens when things change.

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https://digitalbuilders757.com/university/study/proposals-pricing-and-scope

Start with discovery

Before you quote, ask questions. What problem are they solving? What happens today? Who will use it? What does success look like in numbers? What's the deadline and why? What have they tried? Who decides and who pays?

Use the Client intake template in the Builder Toolkit and take notes in their words. AI can turn your notes into a tidy summary you send back: 'Here's what I heard. Did I get it right?'

Scope: what's in, what's out

Scope is the list of what you'll deliver. Write it as outcomes and features a client can check ('A booking page where customers pick a time and get a text reminder'), not technical tasks. Just as important: write what's not included (for example, 'logo design, ongoing content updates').

Scope creep is when extra requests sneak in without changing price or timeline. It's normal for clients to want more; agree in writing how changes are handled (a change request with its own price and time).

Pricing client work

- Fixed price per project: clear for the client; you carry the risk, so scope carefully.
- Hourly or daily: fair for unclear work; harder for clients to budget.
- Packages: a few set offers (for example, Launch, Grow, Automate) at set prices. Easy to buy and easy to repeat.
- Retainers: a monthly fee for ongoing updates, hosting help and improvements.
- Price from the value to the client and the market, not just your hours. Use the Pricing worksheet in the Builder Toolkit.

The proposal

A short proposal beats a long one. Include:

- Their goal, in their words.
- What you'll deliver (scope) and what's not included.
- Milestones and timeline, with what you need from them (content, logins, feedback) and when.
- Price, payment schedule (a deposit up front is common) and how changes are priced.
- Who owns what at the end: code, accounts, domain and data should usually be in the client's name.
- A clear next step to say yes.

Agreements (not legal advice)

Put the deal in writing and have both sides agree before work starts. Many freelancers use a simple services agreement plus the proposal. Rules differ by place and project, so for anything large or unusual, ask a qualified professional or your local small business development centre.

Key terms

Discovery
Questions you ask a client before quoting: problem, users, success, deadline, budget.

Scope
The agreed list of what you'll deliver, and what's not included.

Scope creep
Extra requests that sneak in without changing the price or timeline.

Milestone
A checkpoint in a project with something delivered, often tied to a payment.

Deposit
Part of the price paid up front before work starts.

Retainer
A monthly fee for ongoing updates and support.

Proposal
A short document with the client's goal, scope, timeline, price and next step.

Change request
A written request for work outside the scope, with its own price and time.

Try it: Write a one-page proposal

1. Pick a real or imaginary local business and run the Client intake template (role-play with AI if needed).
2. Ask AI to summarise the notes into goal, scope, out-of-scope and timeline.
3. Price it with the Pricing worksheet and choose a payment schedule.
4. Edit it down to one page with one clear next step.

KNOWLEDGE CHECK

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5 questions. Circle one answer for each; 4 or more correct passes. Answers are at the back.

1. What should you do before giving a client a price?

A. Guess quickly
B. Copy a competitor's price, then lower it slightly so you win the work
C. Ask questions about their problem, users, success and deadline
D. Start building

2. What is scope creep?

A. A slow website
B. A security bug
C. A type of contract
D. Extra requests that sneak in without changing price or timeline

3. Why write what's NOT included in a proposal?

A. To prevent misunderstandings about what the price covers
B. To look busy
C. It's required by law everywhere for any contract over a thousand dollars
D. To make it longer

4. Which pricing model is a monthly fee for ongoing updates and support?

A. Fixed price
B. Retainer
C. Hourly
D. Deposit

5. Who should usually own the domain, code and accounts at the end of a client project?

A. The freelancer, forever
B. Nobody
C. The client
D. The hosting company

Official sites

SBA: Find your local assistance: https://www.sba.gov/local-assistance
Digital Builders services: https://digitalbuilders757.com/services

Last reviewed 2026-11-25. AI tools change fast; check each tool's own site for current features, plans and prices.

ANSWER KEY

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1. C: Ask questions about their problem, users, success and deadline
Discovery tells you what to build and what it's worth.

2. D: Extra requests that sneak in without changing price or timeline
Agree how changes are handled so extra work gets priced and scheduled.

3. A: To prevent misunderstandings about what the price covers
Out-of-scope lines stop surprises on both sides.

4. B: Retainer
A retainer pays for ongoing work each month.

5. C: The client
Clients should own their business assets; say so in the proposal.