How to use the kit

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What's in the kit

InsightOre-Proposal-Template.docx	Editable proposal with three pricing options: Option A Essentials, Option B Standard, Option C Extended.
InsightOre-Proposal-Template-Sample.pdf	Read-only reference copy filled with labelled "Example:" text (not fillable).
InsightOre-Pricing-Calculator.xlsx	Tabs: Start here · Project estimate · Three options · Retainer · Currency display · Copy to invoice · How to use.
InsightOre-Scope-Change-Form.xlsx	One-tab form with cost and timeline arithmetic, printable on one page.
InsightOre-Quote-to-Invoice-Checklist.pdf	One-page checklist to print and tick.
InsightOre-Email-Scripts.docx	Seven short, editable email templates.
InsightOre-How-to-Use-the-Kit.pdf	This guide, including all disclaimers.

Before you start

- Save copies of the files and keep the originals untouched.
- Fill in the calculator's "Start here" tab first: your name or business, client, proposal number, date, currency, rounding step and (optionally) your own minimum hourly rate.
- In the calculator, pale teal cells are inputs and white cells are calculated. In the proposal, grey italic text is guidance for you: delete it before you send.

Step 1: Estimate

Enter tasks and hours in "Project estimate". Your rate and any buffer are your choice; the kit doesn't suggest them. The rows labelled "Example:" and the example default rate are sample figures: replace or delete them.

Step 2: Build three options

In "Three options", mark which tasks each option includes (Y/N), add any extra hours and expenses, and review the effective hourly rate and the optional "Below your minimum rate" flag. Use the price override if you price per project.

- Start from the scope the client asked for. Make that one option, then define a smaller option and a larger one by adding or removing deliverables, revisions, speed or support.
- Change scope between options, not just the price. Each option should be something you are genuinely willing to deliver at that price.
- Prices come from your own inputs in the Pricing Calculator ("Three options" tab). The kit does not suggest rates or price levels.
- You can mark one option as "Recommended for your brief" if you believe it fits best; the template leaves this blank by default.

- If you only want to offer one price, delete two columns; the rest of the proposal still works.

Step 3: Write the proposal

Copy the option prices and text rows into the "Three pricing options" table of the proposal. Replace every [placeholder] and every "Example:" line. Rename the options if you like (they follow the common "Good / Better / Best" pattern). Delete options you don't need.

Logo: insert your logo over the dashed "Your logo" box on the cover, then delete the box. Add alt text to the image (for example "[Your business] logo") so screen readers can describe it. The footer has [Your contact details], the version line and a small, optional "Template by InsightOre" credit you can delete.

Step 4: Send it

Save the proposal as PDF before sending. Use email script 5.1; follow-ups 5.2 and 5.3 if needed.

Step 5: Handle changes

Use the scope-change form and script 5.6 before starting extra work. Use it when the client asks for something that isn't in the option they accepted, or is listed under "Out of scope"; when a change to deliverables, revisions or deadlines is requested after acceptance; and before starting any extra work, so both sides agree the cost and timing first. The new target date adds working days (Monday to Friday) to your original date; check it against holidays.

Step 6: Invoice

Use "Copy to invoice" to move the accepted option's line items into your invoice: pick A, B or C, add any approved changes, and paste the rows as values. The four columns (Description · Qty / hours · Rate · Amount) work with any invoice. Then run through the quote-to-invoice checklist.

Currency notes

The currency code shows next to every amount. The "Currency display" tab uses only the rate you type in, so it's indicative, not live.

Tax

The kit has no tax-specific fields. Add a generic tax line only if it applies to you, and check local rules. Not tax advice; check with a CA (or a qualified tax adviser where you live).

Saving and exporting

Save the proposal as PDF before sending it to a client. Keep a copy of each proposal, change form and invoice together.

Licence (summary)

For use in your own business, including sending filled-in proposals to your own clients; don't resell or share the blank templates. Full licence: Terms of Use, section 6 (https://insightore.in/terms-of-use).

Help and refunds

Email info@insightore.in · Refund Policy: https://insightore.in/refund-policy

Disclaimer

Please read. The InsightOre Proposal & Pricing Kit is a set of templates and a calculator, provided as general information and a starting point. It is not legal, tax, accounting or financial advice, and it is not a legal contract. It doesn't tell you what to charge and doesn't guarantee any outcome.

Replace every sample number, date, name and term with your own, and check every figure before you send it. The calculator does arithmetic on the numbers you enter; exchange-rate figures are only as current as the rate you type in.

The kit has no GST or other jurisdiction-specific tax fields. If tax may apply to you, check with a CA (or a qualified tax adviser where you live). For contract terms, have a lawyer draft or review them.