



The Clients Desk

The Finance Desk

CL-01 · USER GUIDE · VERSION 1.0

Proposal and fee quote builder

Clear, consistent proposals in minutes.

Who it's for

Partners and managers pricing and proposing to new clients.

In this guide

- What this tool does
- What's in the workbook
- Step by step
- Key inputs
- Reading the results
- The worked example
- Tips from practice



What this tool does

CL-01 holds your standard prices and builds a proposal from them. Pick the services, set the quantity and any adjustment for complexity, and it works out the annual and monthly fee. The Letter tab turns it into a proposal ready to send.

What's in the workbook

Tab	What it's for
Guide	How to use the tool, in brief.
Summary	The fee and services.
Prices	Standard prices.
Proposal	Services, quantities and fees.
Letter	The proposal letter.
Licence	Your licence details and terms.

Using the workbook

You'll see	What it means
White cell, blue text	Your inputs. These are the only cells you can change.
Black text	Calculated. Locked so formulas can't be overwritten by accident.
Green text	Pulled from another tab.
Green cell	The key result on that tab.
Red text	Something needs attention: a missed deadline, a shortfall or an overdue chaser.

The worked example is already filled in, so you can see how every input should look. Replace it with your own figures; nothing else needs setting up.



Step by step

- 1 **Prices tab.** set your standard price and pricing basis for each service.
- 2 **Proposal tab.** enter the prospect and pick the services, quantities and any adjustment.
- 3 **Letter tab.** check the wording and save it as a PDF.
- 4 **Summary.** check the total against standard prices before sending.

Key inputs

Input	What to enter	Worked example
Standard price	Your price per unit.	£1,200
Quantity	Employees, units.	18
Adjust	Uplift or discount.	+25%
Valid for	Days the proposal stands.	30

Reading the results

Result	What it tells you
Annual fee	For each service and in total.
Monthly	Annual fee over 12.
Adjustment	Difference from standard prices.
Letter	Ready to send.

The worked example

Figures are illustrative, to show how the tool works. They are made up.

Worked example	Result
Prospect	Bramley Garden Centre Ltd
Proposal date	22 Sep 2026
Valid until	22 Oct 2026
Services	6
Annual fee	£4,458

Tips from practice

- Price on the client's records, not just turnover.
- Show the monthly figure; clients budget monthly.
- Follow up with CL-04 after a week.



Questions

Can I add services?

Yes, on the Prices tab; they appear in the list.

Is VAT included?

No, fees exclude VAT.

Where do proposals go next?

Log them in CL-03 and CL-04.

Your licence

The workbook is licensed to the practice named on its Licence tab, for use in its own practice. You can share its outputs, such as printouts, PDFs and letters, with your clients and your team, but not the workbook itself. See the Licence tab for the full terms in brief.

This tool supports, and does not replace, professional judgement. Check deadlines, rules and penalties against current HMRC and Companies House guidance before relying on them.