The Institute of Certified Bookkeepers

January 2025

Institute of Certified Bookkeepers Software Review

Conducted by Suzannah Whelan –
Sinclair Whelan Bookkeeping

GoProposal

About the Reviewer

Suzannah Whelan MICB PM.Dip owns and runs Sinclair Whelan Bookkeeping, which she established in 2009, after qualifying as an ICB bookkeeper. In 2024 she was shortlisted for two Luca Awards, in the Client Experience and Bookkeeper Influencer of the Year categories.

Sinclair Whelan Bookkeeping is a small practice, based in Billericay in Essex, working with a variety of clients in different sectors, ranging from Limited Companies turning over up to £3m, to the smallest sole traders and landlords. We offer a full range of bookkeeping and accounting services, including a full accounts department service, all aspects of bookkeeping, payroll and self-assessment, plus outsourced Limited Company final accounts and corporation tax returns.

We pride ourselves on developing excellent client relationships and have a very high customer retention – our oldest client has been with us since our first year of being in practice, more than 15 years.

Please note – pricing used in the screen shots is not necessarily my own – some may be from demo screens.

About GoProposal

GoProposal by Sage is a software solution specifically designed to help accountants and bookkeepers streamline their pricing and quotation processes. It allows firms to create professional, tailored proposals and letters of engagement quickly and efficiently. The platform integrates different pricing options into a user-friendly interface that helps firms to easily calculate and present their services. With built-in automation, GoProposal ensures that proposals are consistent, accurate, and reflect the firm's pricing strategy, reducing the time spent on manual calculations and repetitive tasks.

In addition to pricing, GoProposal by Sage provides tools for managing the entire proposal workflow, from initial client engagement to final approval, and letter of engagement signing. Practices can customise templates to suit their brand and client needs and track the status of proposals in real-time. The software also integrates with accounting software and practice management tools, ensuring a seamless workflow between proposal creation and client management. By simplifying the proposal and pricing process, GoProposal helps firms improve efficiency, enhance client communication, and ensure pricing consistency, ultimately supporting better decision-making and profitability.

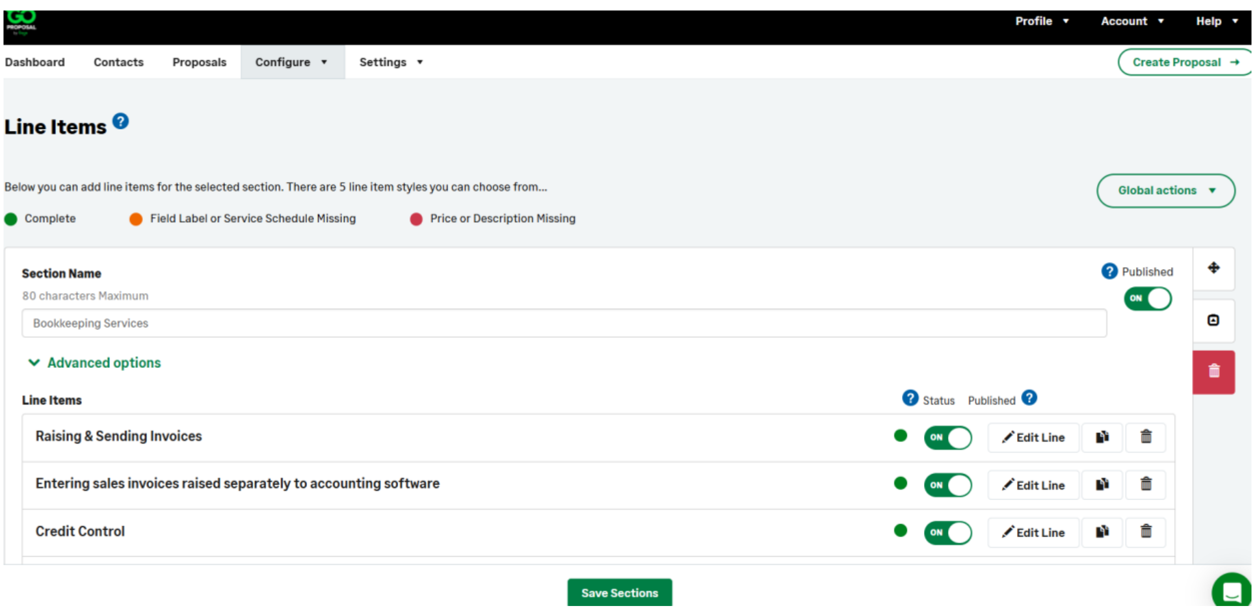
GoProposal was acquired by Sage in October 2021.

The Product

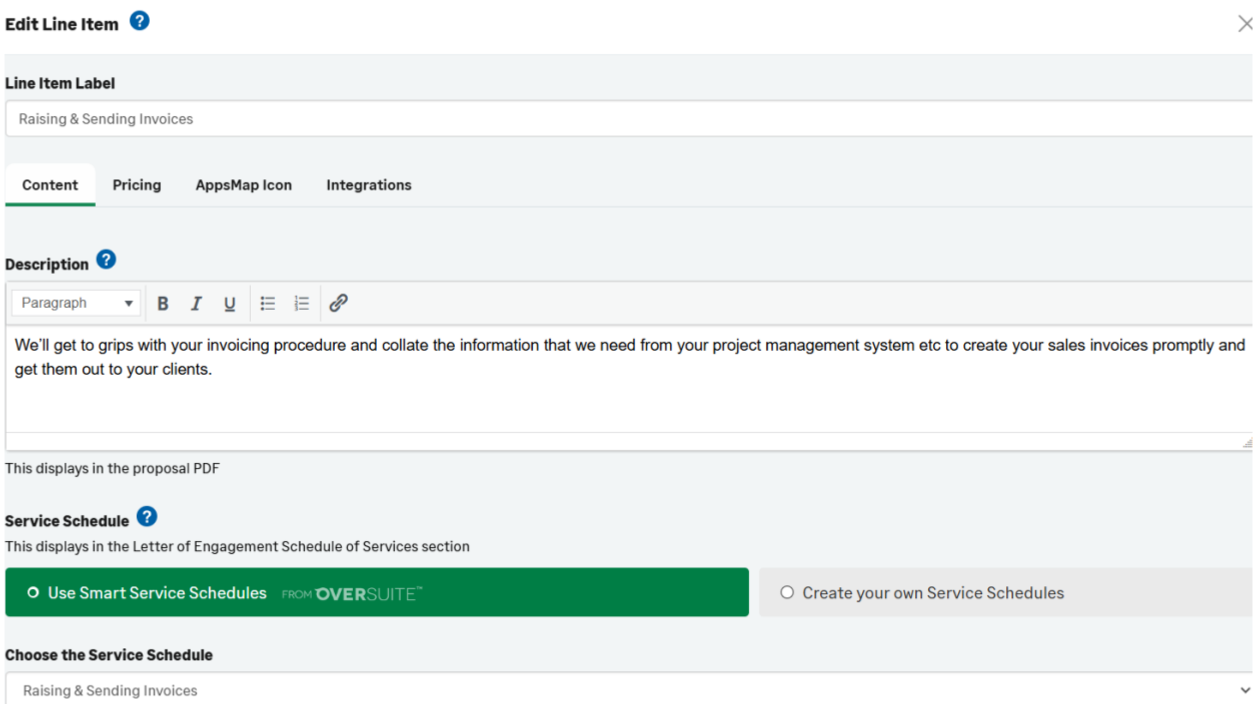
Initial set up - You can configure an initial pricing matrix very quickly (within 5-10 minutes) by answering a few simple questions in the Set Up Wizard about how you currently price certain services for your clients which are the most profitable for your practice. The wizard then populates your line items with fees, which you can use as a starting point.

You can then start by creating test proposals for your clients to see what fees are generated.

Editing line items - Once you see how the pricing is coming out, you can start editing it until you feel comfortable with the resulting fees. You do this by clicking on the Configure dropdown and selecting Line Items. This brings up all the individual services and pricing criteria for these.



You can click into each line item and edit it – there are descriptions of the services already entered, but these are fully editable under the Content tab. The line item descriptions will appear in the proposal when that service is edited, so it's very clear to your client what is included.



Below the Description section is the Service Schedule – this is what will pull through to the Schedule of Services section in the letter of engagement. Existing services already have these set up in Oversuite, if you have purchased this as an add on – this clearly explains the responsibilities of each party in relation to each selected service - or you have the option to write your own.

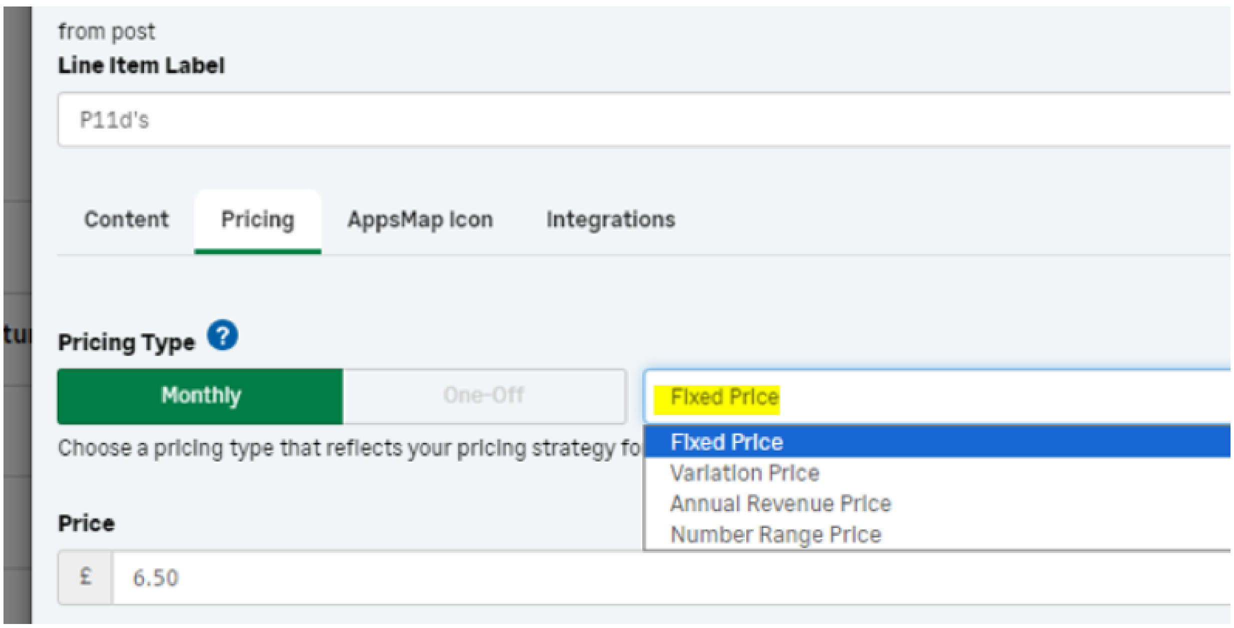
The main templates, services and pricing criteria are already set up, however you can customise these and add more line items, or more variations to existing line items, in order to tailor your proposal and the fees to suit the services you offer and that your clients' particular circumstances require. Instead of "bookkeeping", this is broken down into more detail and could include "how many purchase invoices need entering?", "are you using departments?", "do you have multiple category and/or VAT lines on invoices", etc.

This is an ongoing process and you can keep tweaking the pricing or adding variations to your line items as and when you think of them and as they become relevant to your service offering.

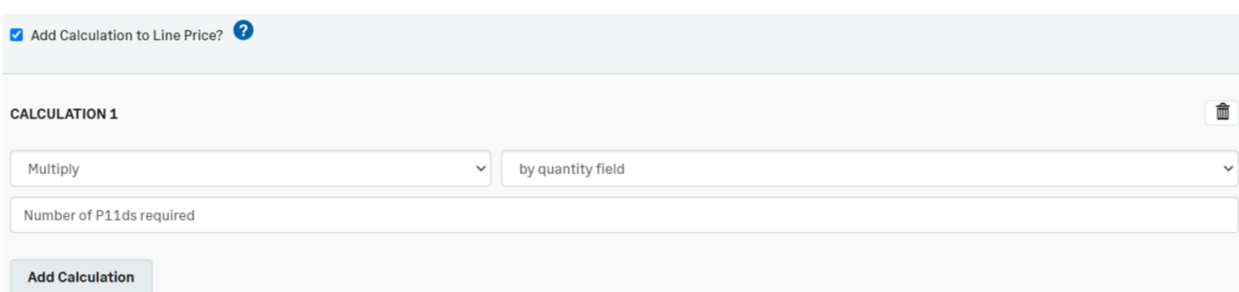
Different pricing methods - Under the Pricing tab you can select whether a service is to be priced monthly or as a one-off fee, and whether you want the pricing to be configured as a Fixed Price, a Variation Price, an Annual Revenue Price or a Number Range Price. These selections all affect the way in which the price will be calculated.

For example, with a service such as Annual Accounts, it's recommended that you use the Annual Revenue Range pricing method as a foundation for the fees charged for this service – ie. the larger the business' annual revenue, the higher your fee.

Fixed pricing allows you to enter a fixed price for a service, either as a monthly or a one-off fee, and with the option to add calculations on top of that. For example you can add a fixed fee for producing a P11d and then you can add a multiplier for the number of P11ds required.

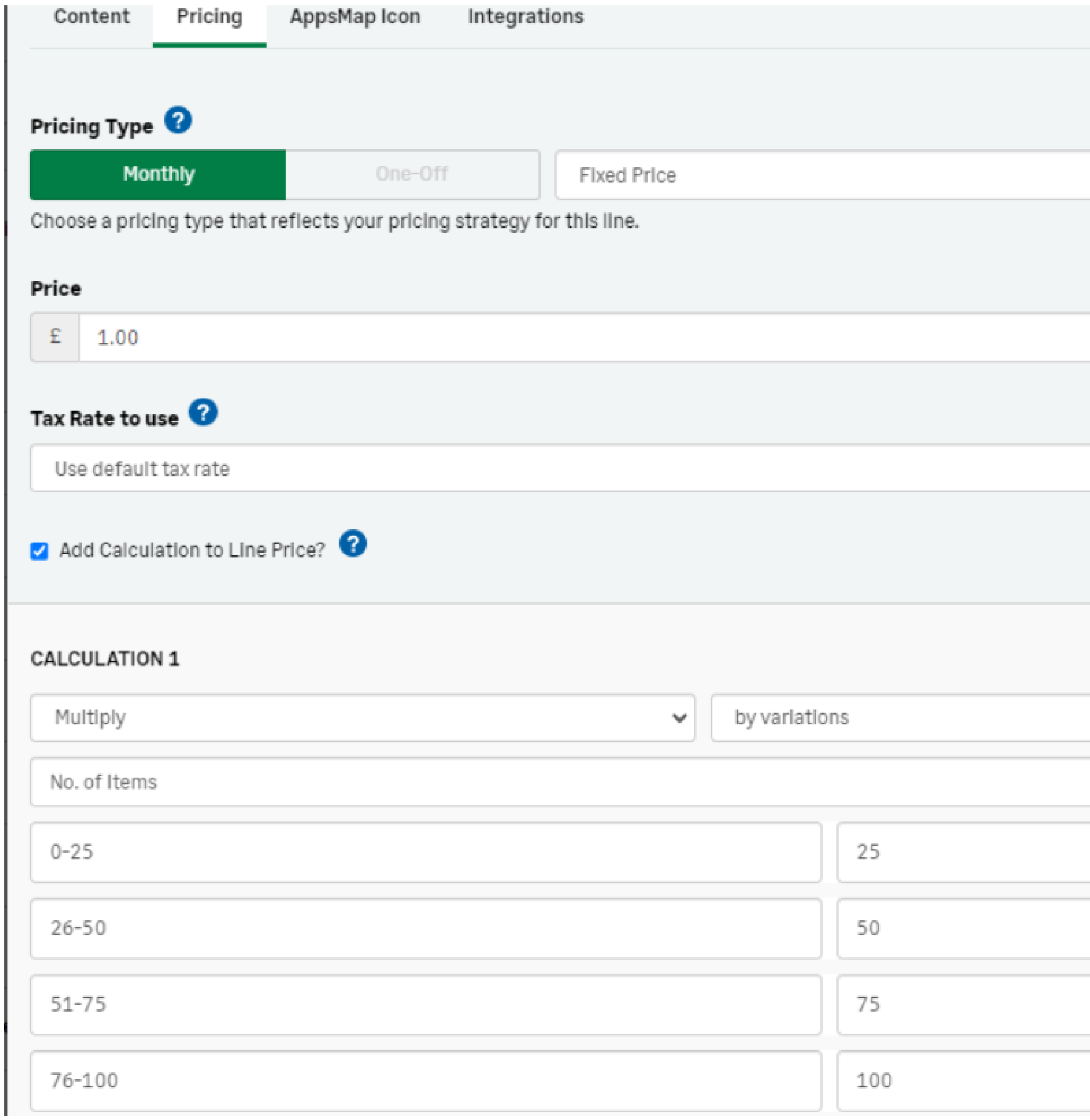


To multiply the cost for the P11d by the number of P11ds required, you would tick the Add Calculation to Line Price tick box, then you can add a calculation by selecting "Multiply" in the first drop down and "by quantity field" in the next drop down – and label this with "Number of P11ds required".



When you are creating a proposal, you would then be able to choose this service and enter the number of P11ds required, and the price would be calculated in the proposal.

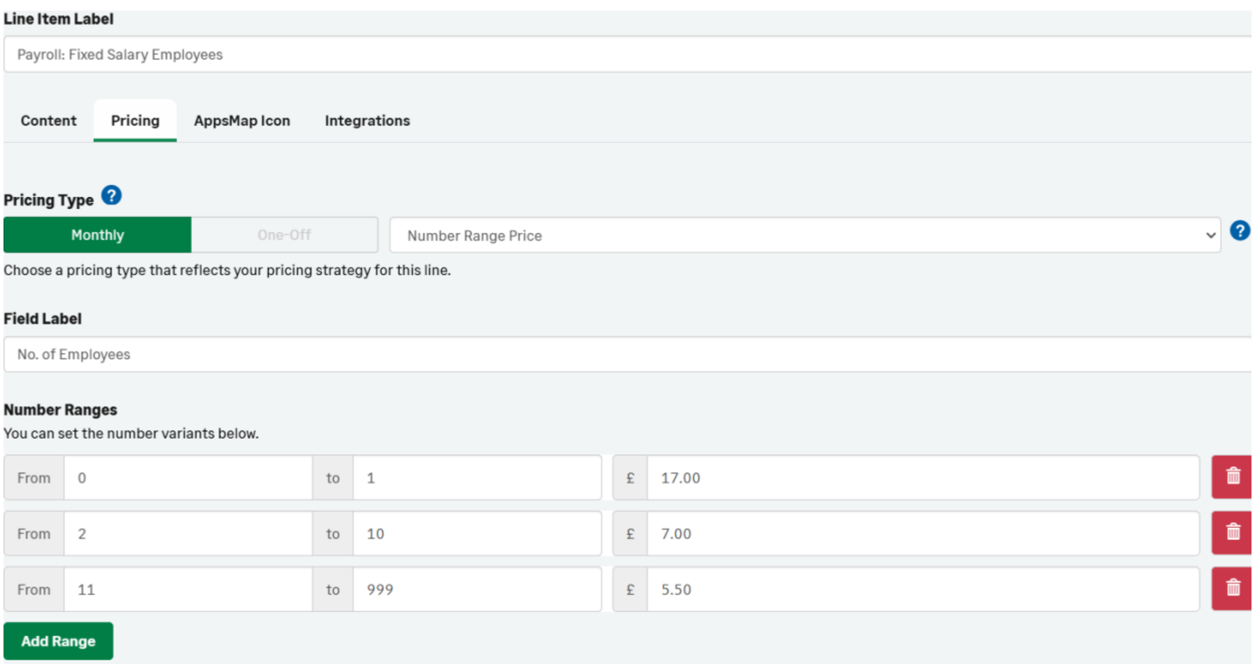
As another example, you might wish to use a Fixed Price method for your Bank Reconciliation service. Eg. you may want to charge a fixed price of £25 for up to 25 items in the bank rec per month, then £50 for up to 50 transactions per month, and so on. You do this by using the "Multiply" option in the first drop down and "by variations" in the second drop down, with the label "number of items". You can then enter your transaction ranges and the fee for each of these ranges.



The Number Range Price pricing method is for services such as payroll, where you might want to add a base fee for the first employee, but the cost decreases for a large volume of employees. You might want to offer this if you had a client with a large payroll where you don't necessarily want to charge the same fixed price for each employee, but instead offer a lower fee per employee the more employees they have.

For example, for a payroll with up to 1 employee you might charge a minimum fee of £17 per pay run, but for subsequent employees, eg. from 2 to 10 employees, you might reduce this to £7.00 per employee, and then for more than 11 employees, you might reduce this again to £5.50 per employee. This would mean that the first employee would be charged at £17.00 per month regardless. The next 9 employees (so up to a total of 10 employees) would be charged at £7.00 per month each. And any additional employees would be charged at £5.50 per month each. So for a payroll with 12 people on it, you would charge £91.00 per month.

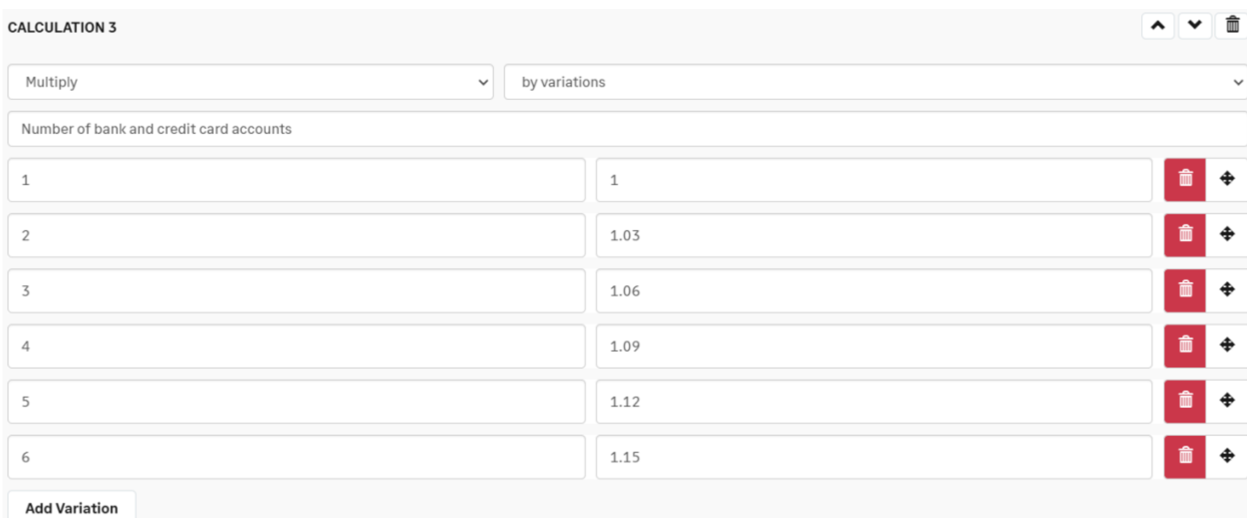
Obviously you can tailor these number ranges and fees however you wish and add more number ranges if you like.



The Variations option provides the most flexibility and gives you the ability to have different service levels within each line item that you offer.

So for example, under my Bank Reconciliation service line, I have a fixed monthly price per item (transaction), which can be multiplied by number ranges, depending on how many transactions need reconciling. I have then added another calculation to multiply by variations, for the frequency of reconciliation required – eg. monthly reconciliation is the standard, so this would be multiplied by 1. Weekly reconciliation, you can charge a premium for, eg. 1.5, and if a client requires daily reconciliation you could charge a higher premium, eg. 2.

In addition, I have added another variation calculation, to charge a premium if a client has more than one bank account that needs reconciling, eg. they could have a current account, a savings account, a credit card account and a PayPal account. You could put the multiplier in as 1 for 1 bank account, and then add variations to increase this for each additional account.



Whilst GoProposal will encourage you to have most of your services configured to a monthly recurring fee, there are some one-off services which you might provide, which would only ever be charged for once, for example setting up a client on accounting software, registering a client for VAT, etc. These can be priced separately and will appear in a separate section on the proposal, under One Off Jobs, so as not to get confused with recurring monthly costs.

Adding new services - You can also add additional new services. You do this by scrolling to the bottom of the relevant section on the line items page and clicking the “add new line item” button.

GoProposal encourages you to think about everything you do for a client and charge for these things! For example, I have added line items such as Process New Starters and Leavers to my Payroll service – these are things that we often do for a client without really thinking about, but are actually extra work, and take extra time, and therefore should be charged for.

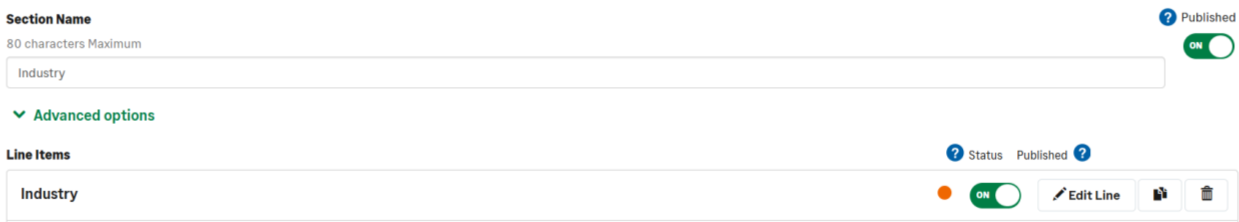
Once you have added a new service you have to configure the line item content and enter the fees and description of the service.

As well as services, you can also add in line items for monthly accounting software subscriptions and apps that you are going to be using for the client, and recharge for these. If the client has their own accounting software subscription which they are inviting you into, you can add in a variation for “client’s own subscription”, with zero charge, so that it still shows in the proposal and letter of engagement. When you configure the line items for these, you can also upload the software or app’s logo and use this in the Apps Map feature in the proposal – this is just a graphic really but looks quite cool and adds to the professional look of the proposal.

AppsMap

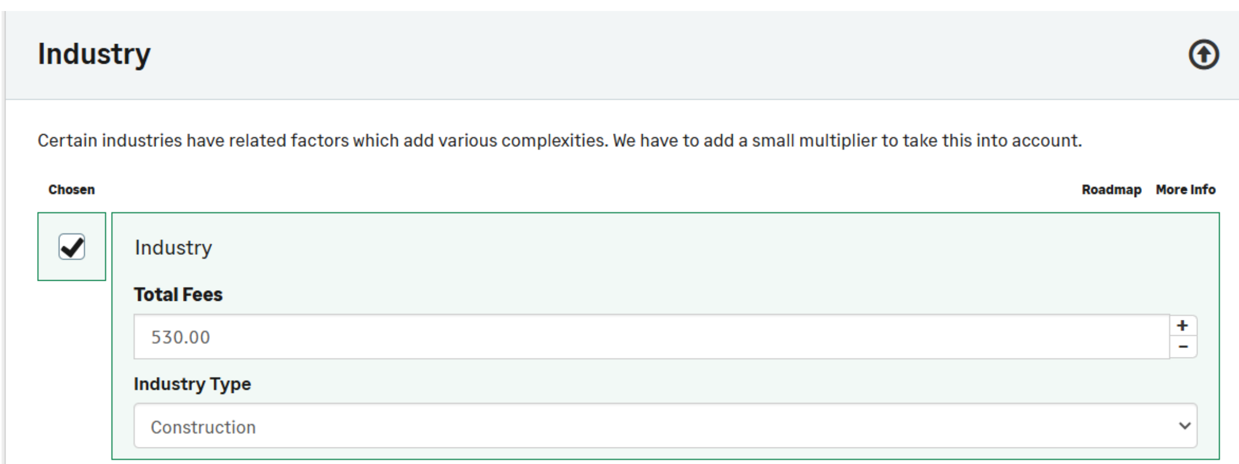
This is a visual map of the apps we're recommending, showing how they work together.

Advanced options - At the very bottom of the Line Items tab there is an Advanced section, where there is an option for Industry.



This gives you the ability to charge a premium (or discount) for certain industries which will by nature have a higher level of complexity associated with them – for example, e-commerce, hospitality, industries with a high cash volume, etc. You can add a calculation against this line item to multiply by variations, with different industries as the variation, with a multiplier premium of your choice.

You can then select this if you are creating a proposal for a client in one of these industries, and this applies a multiplier to the whole value of the proposal. You would need to run an initial calculation first, and then go back into the create proposal section, enter the Total Fees in the box under the Industry line item and select the industry to apply the multiplier, before clicking the Get Calculation button again, to get the overall proposal monthly fee.



As mentioned already, you don't have to have everything fully configured when starting to use GoProposal. There will always be scenarios where you need to add or amend services or add variations to existing line items, and you can increase (or decrease) your base prices at any time. By doing this you can continually evolve your pricing and proposals to suit your practice and your client base.

Proposal Templates - There are templates already set up as follows: New Client, Payroll or Bookkeeping Review (designed for when you are repricing existing clients to prevent scope creep), Annual Fee Review, Extra Work Order – Mid Year, etc. The template chosen will dictate how the proposal document looks, how the email your prospect/client receives is worded and other key elements. You can add new templates - for example, I have added templates for “New Client – Payroll Only” and “New Client – mid-year start, no alignment fee” (for if a client moves to you mid-year for bookkeeping and their bookkeeping is up to date and no catch-up work is required – rare I know!). You can also edit existing proposal and email templates – for example, I found some of the wording a little cheesy and wanted to rewrite it so that it sounded more authentic to my own style.

You also have the option to add testimonials, graphics, etc, to proposal templates should you wish to.

Letters of engagement - The next step is to upload your letter of engagement templates, if you want to use ones that you have already, or for an extra fee you can set up Oversuite, which will automatically generate detailed and robust letters of engagement in line with the requirements of your professional body, in our case this is ICB!

Oversuite - When I initially started using GoProposal I imported my own letter of engagement templates, however, after taking the Oversuite free trial I decided that having Oversuite does make things much easier and quicker, as it automatically pulls through the scope and service schedules to the letter of engagement, according to the type of entity that both your practice and the client is, (these will require different wording/content), and what services have been selected in the proposal. These have been written by legal experts, and are really detailed, including sections which are more complex, such as use of subcontractors, data protection, limitations of liability, etc. They feel more professional and are also automatically updated in line with legislation changes. For me, the extra fee is worth it, both for peace of mind, but also for the ease and speed at which these are created, and the polished and professional look.

As with setting up GoProposal, when you set up Oversuite there is a wizard which allows you to do this in just a few minutes, and you do have the option to customize and tailor parts of the templates.

The Contact Hub - Before you start creating your proposals you also need to set up the Contact Hub. This is where you manage the details of prospects and clients who you will be sending proposals to. You can connect GoProposal to some of the various practice management softwares, for example Senta, Karbon, or Accountancy Manager and import your contacts directly from there, or you can enter your contacts directly into the Contact Hub as and when you need to send proposals to them.

There are features within the Contact Hub that you might want to use if you are a larger practice with a team who are involved in signing on new clients or sending renewals, for example you have the option for GoProposal to send out a weekly report to you summarizing proposals produced, proposals won and renewals due. You can also see the history of proposals sent and various key metrics in each client’s record in the contact hub.

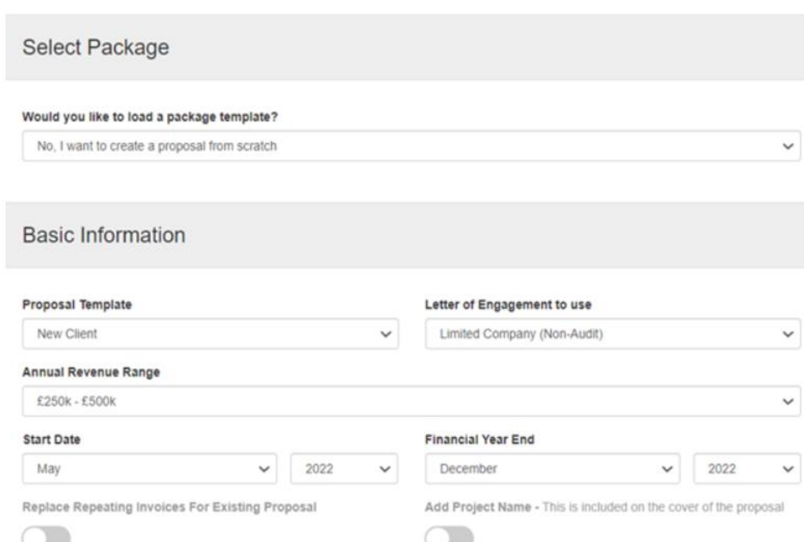
Creating a proposal - Once you have configured GoProposal it's easy to then create a proposal and letter of engagement, which can be emailed to prospects to read through, approve and sign electronically.

GoProposal encourages you to create the proposal live with the client, either face to face or in an online meeting, sharing your screen, in order to get the most successful outcome. There are lots of tips and advice in the James Ashford books and also in the GoProposal Training Academy (only available on Sage Uni, a Sage ID is needed to access the course – here is the link to access) on proposal meeting techniques, and how to prepare, including pre-empting and answering objections and having a proposal script to follow, all of which are really useful and I would highly recommend.

For new prospects my process is to have an initial discovery call to find out more about the business and the scope of services required. I then send out an email questionnaire to gather information on things like the volume of purchase invoices/expense receipts, number of sales invoices, number of bank transactions, bank accounts, payroll numbers, etc.

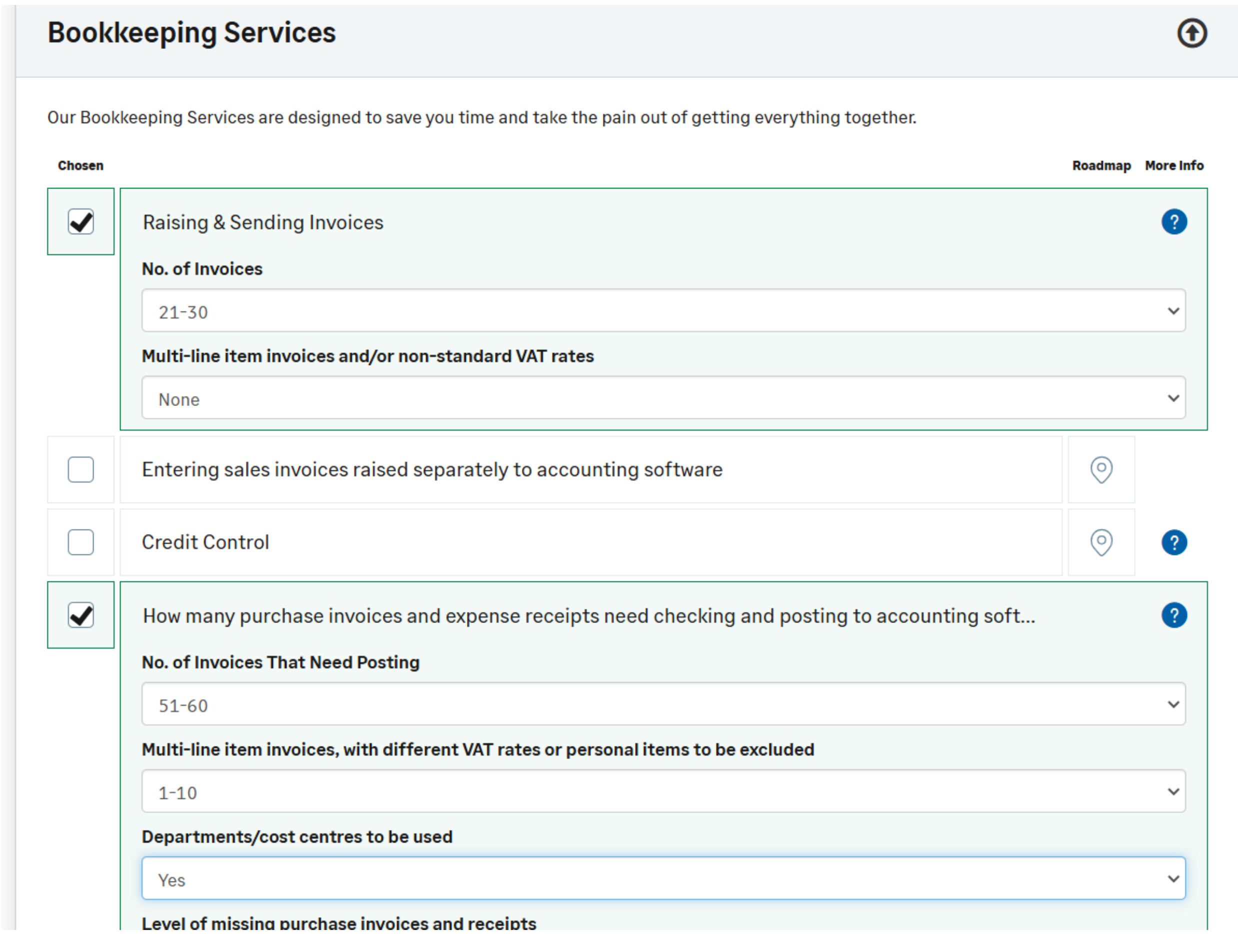
I then find it useful to put together a dummy proposal on GoProposal, as this provides an opportunity to think about which proposal template will be best to use and which services, software and apps might be needed - including those that the client may not have thought about - and price for these accordingly. It also gives you a good indication of what the price is likely to come out at, which helps you feel more prepared and confident in the live meeting. The process for repricing existing clients is not dissimilar.

When it comes to creating the proposal, you can enter a new contact, or search for an existing one and then choose the package template which will preload the services for you, or you can create a proposal from scratch, which will mean all services will be available for you to select. You then fill out the Basic Information section, capturing the letter of engagement template (according to the client's entity type), the annual revenue range for the client, start date and financial year end date.



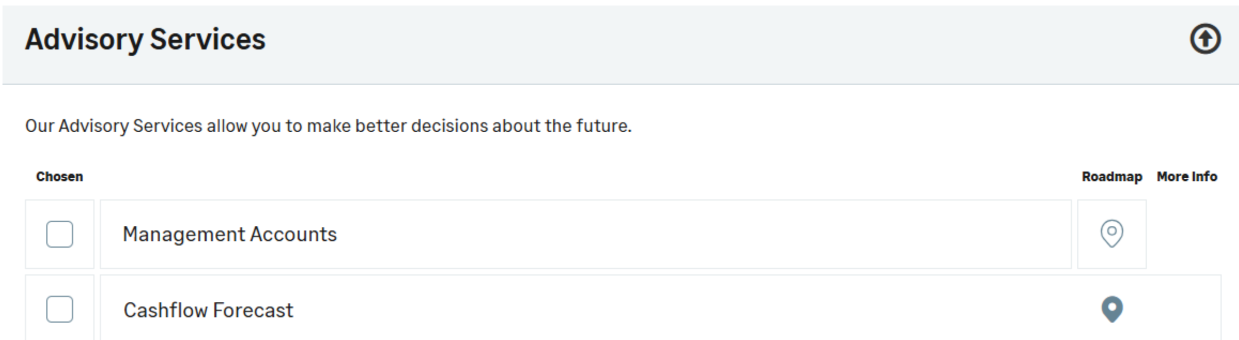
Alignment Fees - There is an Alignment Fee feature (which can be switched off) for any mid-year starts which require catch up work, or when an annual service is priced monthly and so needs an alignment fee in order to charge for the missing months prior to the start date. You can explain this to the client and give them the option to select to pay the alignment fee up front as a one-off fee, or to spread it across the remaining months of their financial year.

You then work your way through the different sections, selecting the required services and filling out further details on these when prompted, eg. transaction volumes, etc, by ticking the relevant boxes.



By doing this live in a meeting, you are building the proposal with the client, getting their agreement at every step as to the scope of services and volume levels. Having the framework of services in front of you gives you the opportunity to upsell by offering additional services such as cashflow or management accounts, which prospects may not have considered. It is a bit like a pick and mix at this stage and prospects can be tempted to choose every service available, but you can explain to them that when the price is generated, you can then take out some additional services if necessary, to bring the price down if it’s too high.

The Roadmap - You also have the option to add services to the Roadmap – for example if the prospect is not ready to commit to a service now, but may like to add it in the future. By clicking the Roadmap marker next to a service, this will add it to the Roadmap section of their proposal, with a description of the service and a price, but it does not include it in their actual proposal calculation, or in the letter of engagement. This not only means that they have an idea of what that service will involve and what it is likely to cost, but also they are now aware that you offer it in the first place, when it might not have even been on their radar as an option.



Generating the fee - When you have worked your way through all of the services and the proposal is ready to generate, you simply click the "Get Calculation" button at the bottom of the screen and the screen then displays the breakdown of services selected with the price for each service shown, along with the total at the bottom. If you want to you can edit the fees for each service in this screen, although it's not really recommended to do this here – if the pricing is not generating how you would like it to, you should really be going back to the line items and reconfiguring the pricing there – and you obviously would not amend this in front of the client, as part of the point is that it is the software giving the price, not you, which helps take any emotion out of it. However, it can be quite useful when you are playing around and trying out different things in dummy proposals.

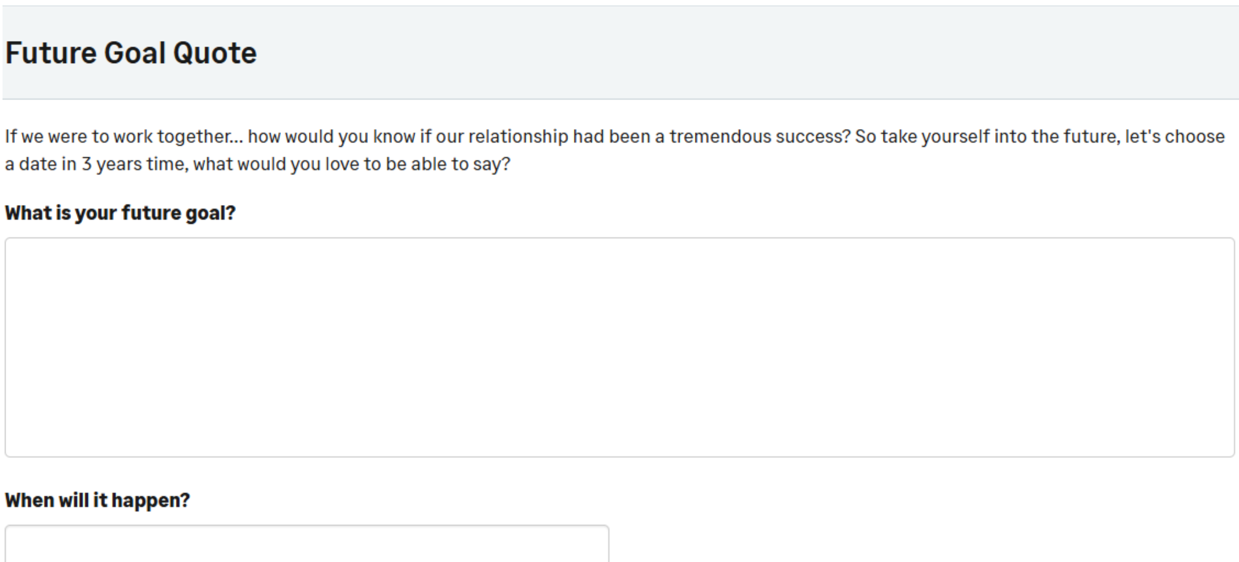
If you were in a live client meeting at this point and the client baulked at the price, you might offer them the option of removing certain services and recalculating the price until it's at a level that they are more comfortable with. It is not recommended to offer discounts or adjust the price itself if these are prices that you are happy with, but by offering to remove services then it may be possible to reach a total fee that the client is happy to proceed with, without compromising the profitability for your practice.

Once you have finished you would then click the "Complete Proposal" button. You may then need to fill out a few more details regarding the client and contact, if you have not already completed these, and you have the option to add additional people, for example where there is more than one director and you would like the proposal and letter of engagement to be sent to and signed by all of these.

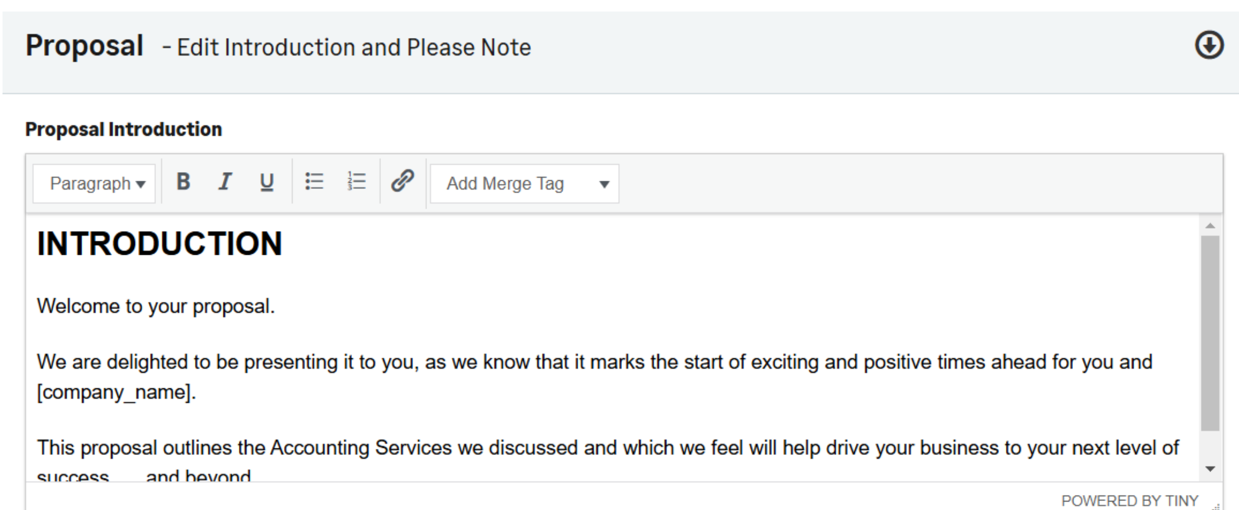
If you have a team you are able to add the name of the person who will be responsible for servicing the client (which also ensures that they will be copied on the relevant emails).

You can add a Follow-Up Date to the proposal on this page as well. This is useful as you can agree in advance with the client when you will contact them if you haven't heard back, which helps to remove any awkwardness if you do have to chase up, as they will be expecting it.

There is also a section to add a quote from the client regarding their Future Goals. This will then pull through to the proposal as a reminder to the client of what you are going to help them to achieve, but you can leave it blank if you don't want it to appear.



Next you can see the Proposal Introduction section, which will be generated according to the template you have selected – however, this is also fully editable here within the proposal before it is generated.



The next section shows how long the proposal is valid for – the default is 30 days, again, this is editable.

You then have the Key Dates section, which shows important deadlines, eg. filing deadlines for VAT returns or tax returns. This will display in the Letter of Engagement but can be turned off if you wish.

You then can click the Customer Email section to show the email to the prospect/client which will be generated to send with the proposal. This is generated according to the template selected, but again, you can edit the text here if you want to.

As you scroll further down the page you then have the option to preview the proposal and letter of engagement exactly as they will look once generated and sent to the client.

Sending the proposal - At the bottom of the page is the “Send to Contact” button, which once clicked will generate the proposal and letter of engagement in seconds and automatically email them to the contact. You will also be emailed a copy of these documents, along with any other relevant team members you’ve added. If you still have some adjustments to make there is a handy toggle which gives you the option to “Save As a Draft”, so that you can save a proposal that you are still working on without it being sent to the client. You can then go back to this proposal in your proposal dashboard, and either send it from there, or create an alternative version and tailor it differently, amending services or transaction volumes, etc, without having to recreate it from scratch. Any proposals saved as a draft do not count towards the number of proposals included in your subscription plan – only proposals that are sent.

Once sent, your proposal will show as “Live” in your proposal dashboard and you will be able to see the email status as Received or Opened, once the client has read it.

Client approval - When your client has received and read through the proposal and is ready to accept it, they can do this electronically from the proposal itself, by clicking the “Approve my Proposal” button on the “What Happens Next?” page. (Again, the content on this page is generated according to the template you have selected and GoProposal pre-populates this with their suggested text but you can amend this – if you want to amend it you have to do this within the template itself). It’s a good way of letting the client know some basic info on what the onboarding process will involve once they have signed up.

WHAT HAPPENS NEXT?

Moving over to us and getting the ball rolling couldn't be simpler:

STEP 1 – Click to approve this Proposal and digitally sign your Engagement Letter.

STEP 2 - We will then start the onboarding process by sending you an onboarding form to fill out with your information and a link to upload ID and proof of address copies for us to perform the necessary AML checks, which we are legally required to do before starting any work.

STEP 3 – We'll then send over a link to set up any monthly payments if applicable

STEP 4 – If you had one, we'll get in touch with your last accountant or bookkeeper and sort everything.

STEP 5 – We will install our accounting system, which comprises of...

- **Software** – accounting software set up & configured to track the performance of your business.
- **Bookkeeping** – receipt capture software set up and integrated with your accounting software to increase the efficiency of your day-to-day financial admin

STEP 5 – We will then organise your Onboarding Session for us to define the goals of the business and provide training to you and any members of your team that you'd like to bring in with you.

APPROVE MY PROPOSAL
#SWB1460

Once the client has clicked the Approval button, they are taken through to a screen where they can electronically sign the letter of engagement. Once this has been done you and any relevant team member will receive email notification that the client has accepted your proposal and a copy of the signed letter of engagement via a Wahoo! email.

Integrations - Another feature of GoProposal is the ability to integrate with your practice's accounting software – this is available for Sage Business Cloud, Xero and Quickbooks – which allows you to automatically generate your monthly invoices to clients as per the agreed fees, saving you time. Personally I do not use this feature as I am aware of past glitches, which have led to errors or invoices not being generated, plus I like to slightly amend the wording on my invoices each month. However, many practices do use this feature, and this would be a real time saver if you had a very large number of sales invoices to send out each month.

Key Benefits

GoProposal is very quick to initially set up. As soon as you have entered some basic details about your practice, uploaded your logo and chosen your branding colours, and answered the basic questions in the pricing wizard, you will be able to start using GoProposal to price new clients and reprice current ones. This initial process takes about 10 minutes. However, to really get the most out of the software, and for it to really be transformative for your practice, you do need to spend some more time and effort customising it to suit your practice and your clients, and I really would recommend using the resources and training in the GoProposal Academy to fully understand the logic behind it and how to apply the methodology.

One of the key benefits of using GoProposal is that it allows you to clearly articulate to the client or prospect the services that they will need and the value of those. How many times have you had an enquiry where the prospect says they need bookkeeping, without having any awareness of what is involved, and then being surprised at the cost? With GoProposal, the framework that you work through when putting a proposal together with a client, ensures that all required services are included and charged for and makes it more clear to the client what doing their bookkeeping or accounts actually entails! Without having this framework to methodically go through it's very easy to forget the different elements that contribute to the work involved and not charge for them, so having this really does increase profitability.

The proposal and letter of engagement make it very clear exactly what is included in your agreement and help with managing the client's expectations. If they require extra services later on you can easily tell them that you will add these to their proposal and send it over – allowing you to charge without an awkward conversation where the client doesn't understand why you're not just going to do it for free.

The pricing is very transparent and gives the client confidence and trust that your fees are consistent and fair. By default the fees are broken down by service, however there is the facility to hide this breakdown of fees if you wish, and just have the services listed with a total fee.

GoProposal is very flexible and it's easy to add new services to your proposals. Each time you think of a service that you are providing to a client which falls outside of your core offering, you can add this to your GoProposal line items. For example, setting them up on accounting software, setting up invoice payment links, even onboarding charges for AML checks. These are all services that the client needs and which have a value, and GoProposal makes you realise that you can charge a fee for these. Having these services configured in GoProposal avoids an awkward conversation with the client, because the fact that the software shows them as an option, which of course comes with a fee attached, reinforces the value and reduces push back on charging.

Likewise, GoProposal really helps you to manage scope creep. Because the initial proposal is clearly set out and the pricing based on agreed transaction volumes, you can compare these with actual transaction volumes, on a regular (eg. quarterly) basis and adjust the fees as and when necessary. It is recommended that you set out the expectation for this in your initial proposal meeting, and explain to the client that the benefits of this work both ways – the pricing is calculated on the expected transactions levels, and if these go up or down, the price will also go up or down accordingly, when you carry out a review, which will be done periodically. This helps to reassure clients that if their business goes through a quiet patch, even though they are being charged a fixed monthly fee, this will reduce in line with the transaction volume – and likewise it protects the bookkeeper or accountant as if volumes and workload increase you can increase your fees in line with this – it is transparent and fair for both parties.

GoProposal enables you to streamline your pricing process and have consistent and transparent pricing, making it quicker and easier for you when you need to quote for a new client or reprice an existing one. For larger practices, it also allows you to remove the practice owner as the bottleneck when it comes to pricing, as you now have a systemized process which any team member can follow to produce a proposal for a client, whether it's repricing an existing client or creating a brand new proposal for a new prospect.

The software is designed for you to put a proposal together live, in front of, and in discussion with the client. This process can make it easier and quicker to get an agreement across the line, as you can tailor it then and there, removing services if the initial price is too high for the client. It also means you can explain exactly what will be needed and why and answer any questions as they spring to mind.

I would suggest running a dummy proposal before any meeting so that you know roughly what the fees are likely to be and to allow you to prepare your responses to any potential objections or queries. It is also possible to create a proposal without the client being present and you can send this to them, with or without an accompanying Loom video where you talk through it, if you're too nervous to produce it in a live meeting.

The speed at which you are able to get a proposal and letter of engagement over to a prospect, and the professional, high quality look of these really delivers a strong first impression and elevates your practice's brand in the eyes of the client or prospect.

Strengths

Behind the GoProposal software there is a whole mindset ethos, which taking the time to learn about and understand will really help you to develop your pricing strategies and enhance your implementation of the software. There is a GoProposal Academy in the Help section of the software, and in Sage University, which has a course with CPD accreditation which you can complete to get you up to speed on using the software, but crucially, to also work on your own mindset to help you with understanding how to communicate the value that you provide to clients and give you the confidence to charge properly and fairly for the services you are providing.

The Help function provides lots of useful information along with instructions and videos to help you configure different features of GoProposal. There is also a live chat bot, which directs you to particular articles, or allows you to message online with an advisor during normal business hours.

Areas to improve

Personally I don’t use the integration to automatically create sales invoices in my practice’s accounting software (QB) as I found this clunky and wanted to overtype the detail generated with my own – plus I was worried that there could be errors or omissions. I have heard of other people using this successfully though.

I know that there is an integration available with Dext Precision, which is useful for repricing existing clients as you can check transaction volumes and turnover levels, etc, and pull these through automatically. I would really love for there to be an integration with Xenon Connect, which is the tool I use for this!

An integration with FreeAgent would also be useful for those who use it for their practice accounting software.

The Alignment Fee feature is great option, but it restricts you to offering either a one-off payment spreading the alignment fee across the remainder of the financial year. It would be useful if this could offer further options, eg. If the client wanted to pay the alignment in fewer instalments.

Value for Money

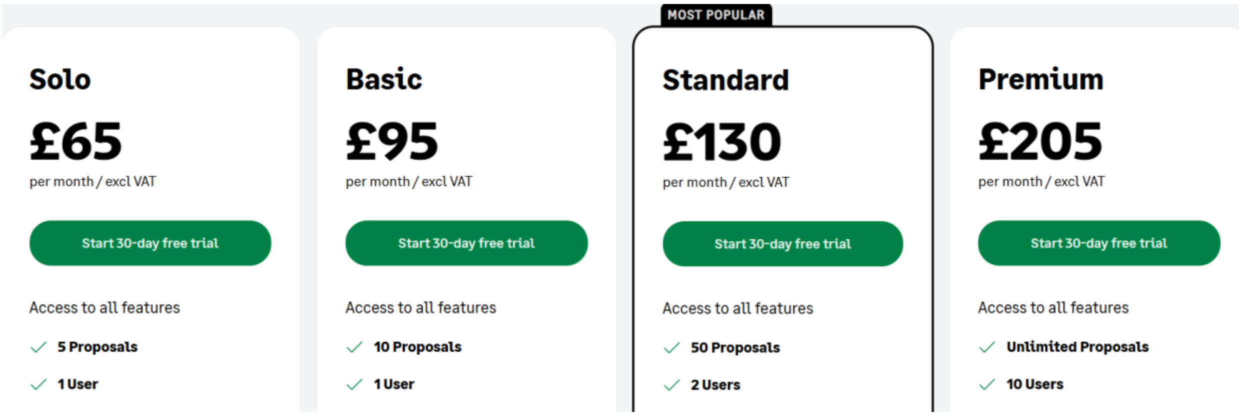
GoProposal does seem fairly expensive when you first look at it – however, if you commit to spending the time setting it up properly and working on your mindset in order to use it effectively it is well worth the cost and will pay for itself fairly quickly, both in the extra revenue it will help you to generate, but also in the time it will save you.

There is a free 30 day trial which you can take out without needing to enter your card details – if you don’t wish to continue it will simply cancel at the end of the 30 days, you don’t have to worry about being charged if you don’t remember to cancel it yourself. You can take the trial out and download your core pricing matrix (a summary of your line item pricing) if you wish.

There is no tie in, you can easily cancel at any time.

There are various packages to choose from depending on the size of your practice and how many proposals you are likely to send per month, and how many people in your practice who will be using it.

Prices overleaf are copied from the website and are correct at January 2025:



You can also take out a free trial of Oversuite and GoProposal AML for 30 days during the GoProposal trial period, or at a later date for 7 days. Oversuite starts at £40 plus VAT per month, for the Solo and Basic packages and increases to £55 and £80 plus VAT for the Standard and Premium packages. GoProposal AML starts at £32 plus VAT per month for the Solo and Basic packages and increases to £55 and £75 plus VAT per month for the Standard and Premium packages.

Testimonials

Here are some testimonials copied from GoProposal’s website:

"GoProposal helps me and my clients understand that the value I offer should be paid for."

My annual prices have become my monthly prices as I now understand that the value I offer should be paid for thanks to GoProposal. Nothing beats helping clients along their journey of building economic independence. GoProposal allows me to be mechanical about my prices and understand that the value I offer should be paid for.

Beverley Sydney
Director

"GoProposal Is A Game Changer”

There's something about seeing a detailed proposal on screen that justifies the price to a client. If you take on a job with a few months of catch-up work, you can make sure those extra months are charged for so you don't lose out. It's very transparent, your clients can see exactly what you'll be doing for them, and they'll also see that they're going to get the same price as another client. There is no special treatment, it's fair.

Jo Wood
Director

"We're giving significantly more value to our clients”

GoProposal's main benefit to us is that it's given us a system for helping us to deliver the services that clients are looking for. We've had conversations where we've increased by 4x and 8x using GoProposal, which means we're giving significantly more value to our clients.

Martin Wardle
Director

"Having OverSuite in the business gives me complete peace of mind"

In our team, everybody produces letters of engagement and we all know that they can produce those with confidence that they're fully covered and they're not putting themselves or the firm in any sort of potential harm's way. The set-up was a seamless process as the OverSuite Wizard made it incredibly easy to do.

Phil Ellerby
Managing Director

Summary of Review

Overall I have found GoProposal to be an invaluable piece of software which has really improved the profitability of my practice, as well as saving me time and allowing me to communicate my value to clients more effectively. The proposals and letters of engagement produced look really professional and impress prospects and clients, helping to elevate that first impression you make when you are first meeting with a new prospect.

In order to really get the most benefit from the software I would highly recommend doing the training in the GoProposal Academy, reading the James Ashford books to get the confidence and theory behind the selling process, and taking advantage of the free onboarding sessions that you are offered. You do need to spend some time and effort tailoring the line items so that these fit your practice's and your clients' needs, and you have to remember that it's an ongoing process, and you will need to tweak line items and add services as your practice evolves.

Personally, I have been using GoProposal now for about 3 years and it has been transformative for my practice, increasing both my profits and my confidence when it comes to pricing clients.

Disclaimer