PROPOSAL TEMPLATE

TO WIN BIG DEALS

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Introduction to Proposals

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INTRODUCTION

We all know that not every proposal is created equally. Some prospects want a simple brochure-type website, some prospects have no idea what they want, and others have an advanced RFP (Request for Proposal) document created.

I have a guaranteed way to get the budgets 100% of the time and eliminate 90% of your competition in our Agency Blueprint, it's so simple and effective you will kick yourself for not finding it sooner.

In this course I am going to show you how I landed tons of 20k+ deals with less than an hour of proposal creation time in my first agency.

1. Proposal must have **overview/introduction**
2. **Definitions** of marketing terms
3. Proposal must have **guiding philosophy**: branding/brand penetration (why do you do what you do?)
4. **Define target audience** & target audience needs
5. **Outline existing assets and processes** (BRING THE PAIN - how much what they're already doing sucks)
6. **Strategic recommendations overview** - Big picture overview about why you're recommending what you're recommending
7. **Project Timeline –** Outline the specific phases of the project
8. **ROI projection** - associate this to real world increases in traffic/leads/revenue/profit. Current versus projected.
9. **Upfront Capital Investment and ongoing retainer/residual investment –** Outline how much this is going to cost.
10. **Frequently Asked Questions** - settle their hesitancies before they have them
11. **How to move forward with the project** - some agencies prefer to have all of the legal jargon in the actual proposal where they can sign and engage on the spot. I prefer to reference the legal jargon on your website to keep the barrier to entry as low as possible. (yourwebsite.com/legal, yourwebsite.com/sla, etc.)
12. **Executive Summary** - This is where you wrap everything up with a pretty little bow and tell them how stupid they are if they don't move forward.
13. **WRAP UP** – Do NOT simply mail this to your prospects, you must personally present the proposal to the prospect and only after you have presented it and framed the entire proposal, you can send them the proposal and always make sure you get a next action date. If you can use an online proposal management system, do it! Proposify works really well.

If you're dealing with an **Advanced** Prospect, here's your proposal template:

Insert Your Logo for Brand Awareness

Insert Prospect’s Logo for Familiarity

PROSPECT’S NAME - Digital Marketing Proposal

(This proposal template is for a comprehensive digital assets management project – A prospect looking for an digital agency to take over all aspects of their digital footprint)

Always have formal footer at the bottom of every page.
Never make them look for contact info; additionally, brand penetrate every chance you get.

Digital Marketing Plan/Proposal

(Don't name it "Proposal;" give it a name that suggests the benefit of your agency. For example if you are a traffic generation agency, name it "Triple Your Traffic Plan".)

PROSPECT'S NAME requested a proposal for the rebuilding of their website, implementing automated follow up processes, and monthly management of Google Adwords/Facebook.

All strategic and tactical recommendations in this plan are to be implemented over time, monitored, tested and optimized for performance. This is important because markets change, target audiences change, and therefore your Digital Assets (DA) should evolve to keep up, increase conversion percentages, and to consistently improve your organization's performance.

The ultimate goal is to develop a digital infrastructure for PROSPECT'S NAME that represents the brand accurately, generates traffic and generates new hot leads. This must be done in a consistent and measurable marketing infrastructure.

Here at YOUR AGENCY'S NAME we pride ourselves on delivering world class digital marketing solutions. As an example of our attention to detail, we have won the following awards, worked with XXXXX, [or anything else that builds credibility in your agency's brand].

We feel we are the best fit for you because our philosophy is to provide world class digital marketing solutions: "We believe that if it is not being tracked, it did not happen." We take this philosophy very seriously and apply it to all aspects of our internal project management responsibilities and to your companies ability to track every dollar spent on marketing/project, etc.

In conjunction to our agency's philosophy to service, there are three primary reasons we feel we are the best agency for PROSPECT'S NAME. Our dedication to excellence, transparent project management process, and over XX years of experience in implementing digital assets and driving traffic make us uniquely qualified to over deliver on all aspects of PROSPECT'S NAME business goals.

I am going to elaborate on everything mentioned here and more in the following pages, we look forward to working with you and as always, if you ever have any questions, do not hesitate to give me a call on my personal cell (555-555-5555).

Nothing but the best,
YOUR NAME

Agency Philosophy - Basic Overview (The Why)

(Explain why you do what you do and why it makes you better than your competition. This section should represent your agency's core philosophy behind your services. Below are a few examples of what it could look like)

HELPFUL HINT – Be very descriptive and use this section to separate you from your competitors, this section can position you as a "Level Above" your competitors if you have a strong philosophy on "Why" your agency does what it does.

CREATIVE – (EXAMPLE COPY) Our agency creates brand identities that wow your prospects and establishes your brand as the go to resource. Please take a moment to review our portfolio and you will see an attention to detail that conveys the essence of all of our clients' brands. We take our time, establish the four pillars of your brand and then design all marketing/sales assets to represent your brand pillars in a world-class fashion.

PROGRAMMING – (EXAMPLE COPY) (Wordpress, CMS, Custom Apps, etc.) – We pride ourselves in writing nothing but the cleanest and highest performing code. Not only is our code some of the cleanest in the world, but we also write it in a way that makes it user friendly for both your prospects and your staff to use. We know how critical it is to have internal staff maintain the majority of your digital systems, with our agency, you can rest assured that the training, day to day management and long term maintenance will be planned out from the beginning and executed to your exact specifications.

CLOSE THE LOOP MANAGEMENT SYSTEMS - (EXAMPLE COPY) At its core, a closed loop management system means that all data from point of contact, sales process and order taking are all tracked in great detail and each order processed can be tracked back to the exact point of initial contact. This is generally done in one CRM system, but it can be accomplished via multiple systems. Even though it can be done in multiple splintered systems, it is best to have one centralized cloud based CRM platform that allocates for lead nurturing, sales pipeline tracking and order processing. This allows for real time KPI dashboards that empower your organization to react to opportunities in real time.

BRAND PENETRATION – (EXAMPLE COPY) The name of the game is to get your brand identity in front of your prospects in a high value manner as often as possible. The reason Fortune 500 companies spend billions of dollars a year on advertising is to penetrate their target audience's subconscious with their brand in a high value or emotional manner. There is a simple formula my marketing mentor taught me: If your prospect has been touched by your marketing efforts on average 7-9 times, their opinion of your agency is a positive one, and most importantly, your brand has now been transitioned from short term memory to their more trusted long term memory. This way, when they are in the market for your services, they will recall your agency's brand, pick up the phone, and reach out to you.

Definitions

(Most organizations don't use marketing terms on a daily basis; give them a quick reminder of the terms used in the proposal)

Digital Assets - Digital Assets represent the goods sold by an organization or they are in themselves among the goods being sold, their value usually increases according to their usage. Digital assets can be reused as is or with minor modifications over time. A few examples of Digital Assets are as follows: domain names, images, multimedia, email lists, target audience data, digital documents (PDFs), Digital Marketing Collateral (Postcards, Re-Printable Materials), Online Training Portals, Websites, Landing Pages, Advertising Copy, etc.

Mind map – A visual representation of complex processes. Mind maps outline the flow of processes or marketing campaigns in a simple to understand visual format. All processes/marketing campaigns should be mind mapped prior to engaging any paid resources (copy writers, programmers, designers, etc.)

Lead Magnet/CTA – Call To Action – Any item that asks your prospects or clients to take action. The most common are "Call Now" or "Click Here". These Calls to Action are critical to any success formula and special attention must be given to all CTAs. Successful business owners understand the value of testing CTAs constantly.

Best Management Practices (BMPs) – Methods or techniques found to be the most effective and practical means in achieving an objective while making optimum use of the firm's resources.

Key Performance Indicators (KPIs) – KPIs evaluate the success of an organization or of a particular activity in which it engages (marketing campaigns, sales rep performance, lead sources ROI, etc.)

Level of Effort (LOE) – All time, money and resources it takes to accomplish a specific task, goal, milestone or project. LOEs are normally more successful if the business owners understand that there is at least a 10% variance and the value of quick decision-making in all LOEs.

Customer Acquisition Cost (CAC) – Refers to the resources that a business must allocate (financial or otherwise) in order to acquire an additional customer.

Content Management System – (CMS) – The platform a company uses to implement, optimize and syndicate content to the Internet.

Target Audience

(These are generic examples of how to define your prospect's target audience. Use the most relative items that your prospect identifies with as their ideal client)

HELPFUL HINT: Insert a brief write up about their target audience's behaviors at the bottom of this page.
HELPFUL HINT: Create an Avatar if you have time, give it a name and let the prospect know that we are targeting (Insert Avatar Name). Everything you do will be to get more (Avatar Name)'s in the door.

1. **AGE** – INSERT BASIC AGE RANGE
2. **NAME** – INSERT BASIC OVERVIEW OF AN IDEAL CLIENT, SOMETIMES USING AN AVATAR IS A GOOD IDEA, JUST MAKE SURE YOUR PROSPECT KNOWS WHAT AN AVATAR IS FIRST.
3. **GENDER** – INSERT BASIC OVERVIEW
4. **HOBBIES** – INSERT BASIC OVERVIEW
5. **INCOME** – INSERT BASIC OVERVIEW
6. **GEOGRAPHICAL LOCATIONS** – WHERE ARE THEIR IDEAL CLIENTS ARE LOCATED
7. **NUMBER OF EMPLOYEES** – IF YOUR PROSPECT IS B2B, INSERT THE AVERAGE NUMBER OF EMPLOYEES THEIR IDEAL CLIENT NORMALLY HAS.
8. **NET INCOME PER HOUSEHOLD** – IF YOUR PROSPECT'S IDEAL CLIENT IS B2C, INSERT THE AVERAGE MEDIAN HOUSEHOLD INCOME.

Outline of Existing Sales and Marketing Digital Systems

(This is when you bring the pain. Explain to them how their existing systems are underperforming, and dramatically hurting the marketing department's performance/conversions. The example below was custom for a specific prospect. You should make this generic and comprehensive at first, then you can simply delete the sections that do not apply to a specific prospect's needs.)

HELPFUL HINT: I would pay close attention to the first few minutes of the introduction call. They normally will mention two or three things that they want fixed. These are their primary hot buttons. The copy below should cater to those hot buttons.

HELPFUL HINT: If you get access to their Google Analytics or can install Usability software (HotJar, CrazyEgg, etc.) you should take some high pain point screen shots (like 404 errors, web forms that are not working, etc.) and insert them into your proposal for larger projects.

WEBSITE OVERVIEW:

Currently (INSERT PROSPECT'S NAME) is using an HTML based content management system and the time it takes to manage this system (third party vendors) and the functionality it provides is out dated and needs to be updated. Websites need to be a true responsive, dynamic and able to be managed in house without having a programmer to implement the most basic items such as call to actions, blog post, social media shares and split testing efforts.

BRAND IDENTITY OVERVIEW:

Currently (INSERT PROSPECT'S NAME) brand does not represent the future of the company. Although this brand has served the company well as it established credibility in XXXXXX industry, leadership recognizes the value in updating all branding assets with a more modern image that represents what (INSERT PROSPECT'S NAME) evolved into and where it envisions itself in the foreseeable future.

Strategic Recommendations:

(When you read below, you will notice the content below is very high level and does not get into great detail. Focus on the big picture in this section; lay out the vision for the next 12-18 months. You do this to see and prepare the client for a long-term commitment with your agency.)

During the investigation phase, the obvious issue is the outdated CMS, lack of conversion tactics, lack of follow up procedures and lack of paid media. Understanding that the goal is to eventually close the loop between marketing and sales, doing this with the existing infrastructure is going to be very difficult, if not impossible. I recommend implementing the following digital infrastructure items in two phases.

- Design new brand identity. This will include the website, landing pages, ads, email templates, etc.
- Implement Rebranded Website into a user friendly Content Management System (CMS).
- Research Customer Relationship Management (CRM) Platforms.
- Implement CRM (Infusionsoft/HubSpot, etc.) for centralized data management and automated follow up capabilities.
- Design and Implement target audience specific landing pages.
- Design and Implement target audience specific automated follow up campaigns.
- Design and Implement an automated sales pipeline management system.
- Establish key performance indicators (KPIs) to track the success or failure of specific media buying campaigns, etc.
- Research and launch media buying (Google Adwords, Facebook, Instagram, etc.)
- Establish media buying and landing page split testing procedures. Test calls to action, taglines, etc.

PHASE 1 – Primary rebranding, infrastructure build out and customer relationship roll out. In this phase we will rebrand all aspects of (INSERT PROSPECT'S NAME) digital assets to convey a professional and strong brand identity across all platforms.

PHASE 2 – Design, setup and roll out media buying (advertising) channels, establish precise KPIs for leadership to monitor performance, set up optimization (split testing) procedures, and maintain digital infrastructure.

Project Timeline

(This is a big picture overview of expected timelines. Consider it a general guideline of how the project should flow from a strategic level. Make sure to give time buffers on all phases of at least 20-25%. It is okay to deliver early, but never okay to deliver late.)

PROJECT PLANNING PHASE .... 1 – 2 Weeks

Finalize project scope document, mind maps, set up project management portal, train all parties on the process, harvest critical login credentials (domain name, Google, etc.).

CONTENT WRITING PHASE .... 3 – 4 Weeks

All content must be completed and approved by the client prior to any design working be done.

DESIGN PHASE .... 2 – 3 Weeks

Create a concept for all pages involved in the project for client feedback and approval

PROGRAMMING PHASE .... 5 – 6 Weeks

Engineering all aspects of the project, coding custom features for content management system, landing pages, lead source tracking, split testing, etc.

FUNCTIONALITY TESTING, CROSS BROWSER, AND FINAL EDITS PHASE .... 1 – 2 Weeks

Present the working concept to your client for final edits and functionality testing. At this point the project should be 99% completed and the client should have minor tweaks.
(P.S. this is when scope creep usually happens, be prepared to handle this with change orders)

GO LIVE AND TRAINING PHASE .... 1 Week

This is when you have final sign off by the client and are ready to push all aspects of this project live and hand off responsibility to the client.

MEDIA BUYING AND OPTIMIZATION PHASE .... Ongoing

We write ad copy, produce creative assets for Google, Facebook, Instagram, etc. We begin running paid traffic to all digital assets and monitor conversion rates on a weekly basis.

Return on Investment Projections

(This section does not always apply. If you are building a website, this section will most likely not apply. If you are driving traffic and can get current media buying, conversion percentages and customer life cycle value this section does apply and can separate you from your competitors.)

HELPFUL HINT: This section does take a little extra work up front, but if you working with a large client that can potentially be large monthly residual paying client; it is definitely worth the additional effort.

Based upon our research of your existing media buying platforms (Google Adwords, Facebook, etc.) we project an increase of XX% over your current traffic levels.

Currently you are driving XX leads a month with your existing media buying efforts. Our projections show that we can increase this by XX% and potentially lower your monthly media-buying budget by XX%.

With your existing sales closing percentage being XX%, we project the following increase in revenue over the next XX-XX days.

Existing Lead Flow and Revenue				
Existing Lead Volume	Existing Sales Close Percentage	Total Sales per Month	Customer LifeCycle Value	Total Monthly Revenue
100 Leads a Month	30%	30	$10,000	$300,000
Projected Lead Flow and Revenue				
Existing Lead Volume	Existing Sales Close Percentage	Total Sales per Month	Customer LifeCycle Value	Total Monthly Revenue
125 Leads a Month	30%	38	$10,000	$375,000
Existing Gross Revenue				
$3,000,000				
Projected Annual Revenue Increase with our Program				
$900,000				
Project Gross Revenue with our Program				
$3,900,000.00				

Based upon our projects, of which are based upon the lead flow, sales close percentages and customer life cycle value provided by INSERT PROSPECT NAME. We estimate an increase of XX% within XX months of implementing our media-buying program.

Capital/Ongoing Investment

(I found that if you position the upfront build out phase as a capital investment instead of a marketing budget line item it helps to close the deal and can open up additional funds for the project.)

PHASE 1 – CAPITAL INVESTMENT $32,000.00

- Design Website Concepts – Up to 30 Pages
- Design Landing Pages – Up to 5 Landing Pages
- Write Website Copy
- Setup Staging Server
- Install CMS
- Implement custom website concepts – custom HTML, CSS, Java, etc.
- Setup Google Tracking – Analytics, etc.
- Setup Usability Tracking – HotJar, CrazyEgg, etc.
- Setup Split Testing Tracking Platform
- Activate Infusionsoft/HubSpot CRM
- Implement automated follow up sequences
- Implement automated sales pipeline management system
- Setup Google Adwords Campaign
- Setup Facebook Ad Campaign

PHASE 2 – MONTHLY/ONGOING INVESTMENT $2500.00

- Set Up KPI Dashboards
- Monitor Google Adwords
- Optimize Adwords based on KPI Data
- Monitor Facebook Ads
- Optimize Facebook Ads based on KPI Data
- 10 hours of digital infrastructure modifications and maintenance
- Monthly performance reporting on media buying channels

Frequently Asked Questions

(These are examples. Think about the top 5-7 questions you get asked after delivering a proposal and place those in this section of your proposal. This shows you're on top of it and it also provides clarity to your prospects. This can also cover you legally in certain situations.)

CAN WE DO ANY OF THIS OURSELVES?

Of course you can, but in our experience that has a tendency to slow things down and increase the budget. We have developed a streamline process that keeps thing moving. Our copywriters work closely with our designers to ensure everything fits perfectly. When someone with no experience writes copy, it normally slows down the entire process, therefore slowing down our ability to produce higher quality leads for your organization.

CAN WE HOST THE SITE OURSELVES?

We strongly recommend you do NOT. Hosting is a very complex process and if your website goes down in the middle of a large media buying campaign the minimal cost saved is dwarfed by the revenue lost in lead generation. Also, most companies are not equipped to manage a dedicated server, security patches and firewalls required to maintain a stable and secure website hosting platform.

WHAT ARE THE 4 PILLARS OF BRANDING?

The four pillars of branding is a common technique used to identify the framework for a successful rebranding project. Some agencies use different definitions for the four pillars, but we use these four. Differentiate, Relevance, Esteem, and Knowledge. Once we determine what these four pillars mean to your organization we can effectively begin to design a world-class brand identity.

HOW LONG BEFORE WE SEE MORE LEADS?

It depends on the details of the Infrastructure Build Out, but on average it takes 90 days. If that is the case, we will have new traffic coming to your site within 2 weeks of the "Go Live" date and leads will begin to increase at that point and continue to increase until you tell us you have too many leads. ;-)

How Do We Get Started?

To move forward with this project, please do the following items:

- Sign the bottom of this proposal and get it back to us. (If you use an online proposal system, ask them to click the execute the proposal via that proposal system.)
- We require a XX% retainer fee to be paid prior to any work beginning.
- If you are ready to move forward, but have a couple of changed to scope, schedule a meeting with your sales representative. Please note that any substantial changes to the project could increase the cost of the project.

When we receive the signed proposal and the XX% retainer fee, we will schedule a project discovery and transition meeting. In this meeting we will introduce you to your team, train you on critical systems, review your proposal and begin the process of developing a detailed project scope document for us both to work from.

We pride ourselves on over delivering. With this in mind, you will have a dedicated project manager you meet with regularly to discuss wireframes, color pallets, design concepts, working prototypes and anything relating to the project as it is outlined in your proposal and scope document.

We also provide a cloud-based project management portal that all files, login credentials and communications will reside.

We do all of this to make your experience as positive as possible. If for any reason you feel your project manager is not being responsive enough or not delivering what you're expecting, we also provide the ability to escalate this project to his or her boss and we guarantee that these meetings will be 100% confidential and handled with discretion. This hardly ever happens, but it is nice to know that you can go straight to the top in case something does happen.

How Do We Get Started? (Cont.) - Legal Stuff

(Some agencies like to put all of the legal copy in the proposal; I have found that to be a substantial barrier to entry. I prefer to reference the legal copy we have posted on our website and provide links for them to review.)

DISCLAIMER: Obviously I am not an attorney, so consult with your attorney if you have any questions about how to best handle the legal aspect for your agency. The cold, hard truth is that if the client has an issue with your services, it will cost you more to fight it than it will to settle it, not to mention the bad public relations/reviews you could potentially get.

If you decide to place the legal copy in the proposal, make sure you cover all possible services you are offering for this project. This should be standardized, and in language that is easy for them to understand. Please understand that you can have fancy legal copy that is prepared by the best lawyer in the world, but if the prospect/client "feels" like they are not receiving value or have been done wrong, there is nothing to stop them from filing a lawsuit against you, leaving negative reviews about your agency, or talking negatively about your agency in your niche/community. At all costs, you should mitigate all negative client experiences and do everything you can to ensure they leave happy at best, or at worst, satisfied with a mutually beneficial settlement agreement.

HERE'S A LIST OF THE MOST COMMON SERVICES AGENCIES PROVIDE:

- ✓ **HTML/CSS CODING** – Define what this means to your agency and make sure they understand what it means.
- ✓ **CUSTOM PROGRAMMING** – PHP, ASP.net, Java, etc. - Define what this means to your agency and make sure they understand what it means.
- ✓ **DESIGN** – Define how many edits they get before being charged additional fees.
- ✓ **PLATFORM PLUGINS** – Wordpress, CRM, API Coding, etc.
- ✓ **AUTOMATION CAMPAIGN SETUP**
- ✓ **PHOTOGRAPHY** – Client is responsible for providing royalty free photos or will pay for you to purchase photos.
- ✓ **COPY WRITING** – If it is not mentioned in this proposal, it is not included in the price.
- ✓ **TECHNICAL SUPPORT** – Make sure you define what is included in your proposal. For example, we fix any bugs for 10 days after go live, etc.
- ✓ **TRAINING** – We provide X hours of training on the CMS/CRM/Custom applications, etc. Any training required after the X amount of hours will be billed separately, etc.
- ✓ **GO LIVE** – During the go live process, we will make sure your emails are working, cross browser, etc.
- ✓ **CROSS BROWER** – We do not cross browser for anything earlier than Microsoft Explorer 7, etc.

There are tons of example contracts if you Google search: "Digital Marketing Project Contract." Here are some of the more comprehensive ones.

https://www.jonathanlea.net/2013/free-digital-marketing-agency-terms-and-conditions/

https://stuffandnonsense.co.uk/projects/contract-killer/

Again, there are hundreds of templates out there. Get one and customize it to your agency's specific service offerings if you cannot afford an attorney. Now, if you can afford an attorney, do the same thing and then get your attorney to review it before posting it on your website or in your proposals.

Whether you decide to put the legal terms in your proposal or not, you should always define the payment terms in your proposal.

PAYMENT TERMS

(Below are my suggested Payment Terms – of course if your payment terms are different, please be sure to change these.)

50% Retainer
30% Upon Beta Delivery
20% Upon Go Live

Monthly retainer fees begin upon the Go Live phase.

[INSERT ORDER FORM LINK]
I like to insert an online order form for them to process the 50% retainer fee. Always think about how you can remove barrier to entry points, without opening your agency up to liabilities. You can always refund the retainer fee if they come back with additional scope changes before the sign the proposal.

SIGNATURE AND DATE

SIGNED FOR [INSERT PROSPECT NAME]	**SIGNED FOR [INSERT AGENCY NAME]**
____________________	____________________
DATE	**DATE**
____________________	____________________

Executive Summary

A few things to consider for this section:

This is your last chance to WOW your prospect with your philosophy, awards (insert awards in footer area if you have them), social proof and social trust items, etc.

- This section should wrap the entire project up into a simple to understand recap. When writing this section, try to think as if the person reading this proposal has never talked with you and is hearing about this project for the first time.
- It should outline your dedication to their success and their ability to always contact leadership with any questions or concerns.
- It should remind them of ***why*** they contacted you for a proposal (their Pain Points) and it should clearly outline the solution you have proposed.
- Make sure to paint a clear and compelling picture of what their business will look like after you go live with their website, automated campaigns, media buying campaigns, etc.
- If you have ROI projections, you should include them in this section again, and it should remind them of how much money they have lost (or would lose) if they choose to not implement your suggested recommendations.
- It should explain that someone in the leadership position has reviewed this proposal and approved everything. This only applies if you have more than one person in your sales department.
- It should thank them for the opportunity to earn their long-term business and you look forward to partnering with them to grow their business.
- Have a personal signature: Write something that they personally mentioned during the negotiation phase.

We wish you and (HUSBAND, WIFE, PARTNER, etc.) well,

Your Signature

Now go out there and close some big deals!

PS: *As always, if we can assist you while you grow your agency, do not hesitate to call us at (844) 409-0994 or visit us at www.digitalbusinessarchitects.com.*