

# MARKETING PROPOSAL



## The Overview

This purpose of the overview is to show your client that you understand the opportunity at-hand, the market conditions they are facing, and how you and/or your company can help them achieve the goals and objectives. Be careful to keep this section about the client, not you.



## Our Idea

The next step is to write a summary about your campaign idea(s). You want to be careful to not reveal so much detail that they run with your idea and never hire you. You want them to see that you've given it some thought and you have a plan when they hire you.

## Prove Your Idea

In step three, provide the prospect client with statistics and research that backs up why you think your ideas are viable. In some cases, you may be able to provide insight into an area of opportunity that they never thought of, thus giving you a competitive edge.

## Objectives

In step four, list out the objectives that you plan to achieve and when.

For example:

- Complete the 2009 marketing strategy and schedule within 30 days

This gives your client a list of deliverables and sets the expectations and benchmarks for success. It also empowers your client to keep you accountable for what you say you'll deliver.

## Measurement of Results

In step five, you establish how you and the client will measure success. Be as specific as possible. For example:

- Increase the number of unique visitors at the website by 10% within 90 days of the campaign launch

The temptation is not to be specific because nothing is guaranteed. However, establishing measurable results will build confidence in your client and give you and your team a scoreboard in which you can measure your own success.

## The Value to [Client Name]

In step six, you establish credibility with your clients. This is where you talk about your previous successes, your technological advances, best-practices and current and/or previous client accomplishments.

## Timing

In step seven, you estimate how long it will take for you to plan, execute and provide proper analysis of the idea(s) and when you can start on the project.

## Methodology & Options

One of the keys to a proposal is providing options to your client. If you only give them one, they will see your proposal as take-it-or-leave-it proposal. That will leave you clientless in a heartbeat. However, providing them options empowers them to decide how they will use you based on their needs, not yours. Here are the options that I generally provide to my clients:

**Advisory** – In this role, you typically serve in a short-term capacity. Perhaps, three to six months. Your aim is to establish the campaign plan, strategy and analytics, then empower their team to execute.

**Consultative** – In this option, you do everything that you would have done in the advisory role, but you work with the staff individually to make sure they are trained to do the job well. You also help with the initial execution of the campaign, but leave the day-to-day details to them. The timing of this option could range from three to nine months.

**Collaborative** – In this option, you do all of the above PLUS you work in the day-to-day. The estimated time of involvement will depend on the complexity of the project.

## Terms & Conditions

In step nine, you present the following:

- financial fees for each of the above options
- payment terms (how much you need upfront to start the contract; discount if contract is paid in full upfront, etc)
- expense terms
- any other conditions you want to put on the proposal
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As a general rule, it's a good idea to keep your terms and conditions minimal, especially with corporate clients. If you opt for the long detailed versions, expect delays due to legal involvement. It's best to offer the minimal conditions and let their legal team take lead if they decide that your proposal needs legal involvement.

## Acceptance

In step ten, your client checks their desired option, signs and dates. Don't forget to provide an easy way for them to send the contract back to you.

## Conclusion

While this process may seem long and drawn out, you're right it is. The proposal is where we make our money. What keeps your clients coming back are results. Those results are determined by what objectives and measurements you provide within your proposal.