

### Important Notes:

1. This is adapted from an actual proposal I developed for a client. They ended up choosing Option 1.
2. This proposal format is adapted from the book *Million Dollar Consulting* by Alan Weiss. I highly recommend you read this book!
3. Some of the language in the “Joint Accountabilities” section is excerpted from the book above.
4. I use this proposal in concert with my Creative Brief (available at <http://elizabethhanes.com/how-to-work-with-me>), which is adapted with permission from one provided to me by the inimitable Debra Gordon (<https://debragordon.com/>)
5. This proposal is NOT used as a Letter of Introduction! The proposal falls nearly at the bottom of my sales funnel, which is structured like this: Prospective client contact initiated either via LOI or by their contacting me through my website > Creative Brief completed > Phone interview conducted > Project Proposal submitted > Negotiation > Contract signed (or not) > Work commences (or not).
6. You should make your proposal look as attractive as possible. For instance, include your logo and/or a cover page. Make sure the formatting looks good. Apply some graphic design skills to this proposal. The one you see here is just a bare-bones walk-through.

## PROJECT PROPOSAL

Prepared for: [Client business name and contact name]

### Situation Appraisal:

[Client] wishes to fully realize the potential of its content strategy by creating high-caliber copy that can be repurposed from blog posts into other marketing materials, such as drip campaigns, one-sheets and trade show brochures. Client previously attempted to implement a content strategy that was compromised by poor quality copy produced by low-budget freelance writers. Going forward, blog posts will serve as a foundation for the content strategy and will position client as a thought leader in the [redacted] industry and elicit blog subscriptions by the target market of healthcare executives.

**Commented [BH1]:** All of this information was provided to me by the company in the creative brief and a subsequent follow-up phone interview.

The Situation Appraisal can be much longer than this. Write as much as you need to adequately describe the problem and solution. Three to five paragraphs, max.

**Commented [BH2]:** Ditto

### Objectives:

Our objectives for this project include:

- Create an editorial strategy and calendar to drive blog topics and posts
- Produce high-quality blog posts at a consistent rate
- Repurpose the content into other mediums
- Increase inbound marketing leads through blog subscriptions
- Enhance the company’s status as a thought leader

### Measures of Success:

Our metrics will include:

- Assessing whether or not deadlines have been met
- Subjective measurement of content quality by client
- New blog subscribers
- Social shares

### Value to the Client:

The value to [client name] will include:

- Enhanced name recognition within the vertical
- Increased inbound marketing leads
- Economical content costs due to repurposing
- Steady rise of organic search rank

#### Methodology and Options:

**Option 1:** On a monthly basis, I will work with [contact name] to develop a blog editorial calendar that outlines the specific post topics for each coming month. The blog posts will be produced on a 30-day deadline. For example, April posts will be determined by March 1 and delivered by March 31. I will produce three posts per month, and each post will be 500-750 words long. I will interview up to one expert for each blog post, if requested, and otherwise will use only secondary sources (to be cited in-line).

**Option 2:** Includes Option 1, and I also will create social media copy for up to three channels (e.g.: LinkedIn, Twitter, Facebook – but you can decide which channels) to accompany each post.

**Option 3:** Includes Options 1 and 2, except I will write a total of four blog posts plus social copy per month.

#### Timing:

The project will commence as soon as possible. As this is an ongoing project, there is no end date at present.

This contract may be terminated by either party for any reason with 30 days' notice.

#### Joint Accountabilities:

This project is collaborative in nature. To wit, my responsibilities include:

- Adherence to agreed-upon deadlines
- My own administrative and office costs
- Delivery of any agreed-upon progress reports
- Prompt responses to emails or phone calls
- Working with staff members and other contractors as required

Your responsibilities include:

- Making yourself available for interviews or phone conferences as required
- Providing background information and other relevant materials to support the project
- Prompt responses to emails or phone calls
- Payment in conformance with the terms outlined below

Our joint responsibilities include:

- Alerting each other of any potential delays in the project
- Alerting each other of anything we learn that could materially affect the success of the project
- Respecting each other's confidentiality and proprietary materials and approaches
- Working to resolve conflicts, coordinate priorities, overcome unforeseen events, and so on

**Commented [BH3]:** This is a poor "option three" because each one should be unique, with discrete deliverables. In other words, never offer "more of the same" for the options because this allows the client to negotiate based on volume. Rather, you want to force negotiations to involve \*loss of value\* for any \*loss of dollars.\* A better Option 3 would have been something like, "Includes Options 1 and 2, plus I will produce a quarterly white paper."

**Commented [BH4]:** This is my standard termination clause because I don't want to be forced to work with anyone who turns out to be a jerk, and I don't want to force anyone to work with me who doesn't want to. But you should craft your own terms.

Terms and Conditions:

The fee for Option 1 is \$2,500 per month.

The fee for Option 2 is \$3,000 per month.

The fee for Option 3 is \$3,300 per month.

The fee includes a reasonable number of revisions within 14 days of draft submission. An initial \$500 deposit is required to commence work on the first month's blog posts, with the remaining balance due net 30 after the initial set of blog posts is delivered and invoiced. Subsequent months will be invoiced in full on the last day of the month. Terms net 30. Past-due balances accrue interest at a rate of 1.5% per month (18% per annum).

**Commented [BH5]:** I require a \$500 deposit in advance from new clients. I used to charge a percentage of the fee, but this turned out to be unwieldy. I omit this clause when preparing proposals for companies I've worked with previously.

We accept payment by U.S. check made payable to [YOUR company name], or via PayPal to [your email]. See mailing address on first page.

If expenses accrue in the form of fees for obtaining research studies or other items related directly to the production of the work, the client will authorize or decline these in advance. No expenses will be billed without prior authorization.

Your deposit, in the absence of your signature below, also will indicate your acceptance of the project, along with the terms and conditions as stated herein.

**Commented [BH6]:** This is an excellent clause to include because in mega-corporations it can be easier to obtain a check than to get a signature.

**Non-disclosure Agreement ("NDA"):** All information exchanged between client and [YOUR business name] during the course of this project, whether such information involves the client's business or that of [your business name], shall be considered proprietary information and shall be held in the strictest confidence by both parties. This confidentiality shall be maintained in perpetuity after the end of the contract, except in cases where disclosure of the information is required by law or by a court order. Each party may release the other party from the terms of this NDA at any time. Client expressly grants [your business name] the right to reference the general nature of the project on the [your website url] website for marketing purposes. In this case, neither the client name nor any details of the project will be shared without prior consent. For example, a line item stating: "Thought leadership blog posts for healthcare technology company."

Your signature below signifies acceptance of these terms and authorizes [YOUR business name] to begin work on the project option you have checked:

\_\_\_ Option 1      \_\_\_ Option 2      \_\_\_ Option 3

\_\_\_\_\_  
Your name dba your company name  
Date

\_\_\_\_\_  
[Company name, contact person name]  
Date: \_\_\_\_\_