The Creative Professional's Guide:

HOW TO WRITE BETTER PROPOSALS



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Introduction

I've been an independent design consultant since 2007. In that time, I've written my fair share of proposals and I've tried plenty of methods for creating them. But systems and software will always play second fiddle to *how* you approach your proposals. If you have a Ferrari and don't know how to drive, that high-performance machine isn't going to take you anywhere!

Until as recently as 2013, I tackled my proposals as many other creative professionals. I used a clunky, time-consuming system that consisted of InDesign, PDF, email and manual follow up. The *how* of my proposal writing was nothing more than an elaborate quote. The *why* didn't exist past someone needing a proposal (but more on "hows" and "whys" later).

After years of frustration, I decided to get my proposals on target. I knew I wasn't the only one who suffered from proposal insecurities, and I knew I certainly wasn't the only one who needed to win more projects.

This frustration culminated in the launch of Nusii. Nusii is *now* an online proposal creation tool used by creative professionals from all over the globe, but at the time I had no idea what it would become. At worst it was destined to be my own personal proposal management system.

As I was building Nusii, I continued my consulting work while also writing and self-publishing *The Designer's Guide to Freelancing*. In 2014, I co-launched a job board exclusively for designers, and started a podcast where I got to interview some fantastically clever consultants. But this whole time something was nagging at me. There was something else I needed to do.

Make proposals easier for my peers.

Some have asked, "Why proposals?" After all, it's not the sexiest of problems to tackle. But the answer is easy. I went after proposals because I both hated and struggled with them in equal parts. They were my nemesis.

Quite honestly, I wanted proposal writing to take up less of my bandwidth on each project.

Once I hammered out the key elements of building excellent proposals, I discovered there's no magic involved. That's right—there are no secret strategies, and you don't need to be a wordsmith to consistently win projects.

And that's why I'm here writing this book. I'm confident that *The Creative Professional's Guide to Better Proposals* will help you to write consistently better proposals, win more business and create a better tomorrow for your business.

Oh, and what about real-world results? My proposal acceptance rate is 92%, which keeps my bank manager happy.

Chapter 1: What’s a Proposal?

> *“Proposals are a way to communicate value and reduce risk”. - Kai Davis*

Let’s not beat around the bush. Few people enjoy writing proposals. They eat away precious billable hours, they can be tedious, and a portfolio is all you need anyway, right?

UUUURHHH! Sorry…

An amateur can make do with a quick-hit “quote email” that says, *“That’ll be $3,500, please.”*

But a professional who wants to leverage their expertise into bigger and better projects uses a full proposal.

A flash quote is like a flirtation on Tinder, while a well-crafted proposal is like an engaging conversation over a glass of wine.

You can regularly serve clients willing to pay exponentially better rates by wooing them with a proposal which sells the promise of a better tomorrow.

But Why Bother? My Work Speaks for Itself.

If a great portfolio was all you needed, I’d have written a different book.

Now I know there are plenty of creatives out there who feel a proposal is unnecessary. They have regular leads coming in and besides, only those who are desperate for work need proposals, right?

This couldn’t be further from the truth.

The fact is, if you’re *not* using proposals, then you could be limiting yourself to the type of work you take on, the compensation you command and even the *type of client* you work with.

Throughout *The Creative Professional’s Guide to Better Proposals*, I'll share EVERYTHING I know about proposals. Everything I’ve learned over the last ten years as a freelance consultant and everything I’ve learned as the founder of Nusii is right here.

So get comfy and dig in.

Really, What's a Proposal?

A proposal is a document that says you understand your client's needs. It says you know how to help and that you can, and it sets the expectation for a better future.

But a proposal is also a link in a chain—*it is not a stand-alone product*. What do I mean by that? I'll get to that shortly…

Strangely, a lot of creatives think proposals are either for agencies or complete beginners. This is a huge myth, and I'm here to destroy it.

Proposals sell your services in a way that quotes and simple emails could never dream of. The truth is, if you don't know what a proposal can do for your business, then you're leaving a lot of money on the table.

Some argue that a proposal is nothing more than an estimate or quote, albeit a rather detailed one. But I would argue that a quote or estimate gives a direct cost/service correlation and little else. It reduces all your energy and expertise to a line item--a dry transaction.

A quote says nothing of your understanding of the client's problem, or the ways in which you can help solve these problems.

A quote offers no context, no connection, no value. It's only a price tag, and if you don't help clients understand the value you're delivering, you're out of the game and the client moves on.

You're simply a commodity.

I don't want to be a commodity, and I don't want you to be one either. So let me show you the framework of proposals that seal deals. This framework can also help you showcase your reputation and, more importantly, the business-changing outcomes you can bring to them.

Proposals Are About Finding Problems and Presenting Solutions

The problem might not always be evident (even to the client), but by engaging your client and *actively* listening, you can get to the root of a problem and offer a viable solution. Once a client can see the benefits of a solution, the cost becomes secondary, and this is the key.

As we generally think of ourselves as creative types, what I'm about to say might not sit well.

One of the most common mistakes I see in proposals is when consultants try to impress their clients with their skills and tools. Focusing on your skills automatically leads a client to

wonder how you stack up against other providers, making you look like any old hired gun instead of the expert you are.

If you only take one thing away from this book, then let it be this: clients rarely care about the tools you use to get the job done. **Clients care about results that will improve their lives and businesses**. So forget about selling skills.

To your client, improving their business might mean something as simple as money in the bank, less time in the office or just looking good in front of the boss. It's up to you to find out what's important to them and communicate that back to them. A great proposal does just that, making it the ultimate self-help tool.

To understand what a proposal can do for *your* business, it's a good idea to look at a few common proposal misconceptions.

Chapter 2: RFPs and Tenders

“The company is justifying an already chosen vendor”. - Ryan Northcott

There tends to be great confusion in the creative world around proposals, RFPs and tenders. To confuse matters further, the definition can vary depending on the country you’re in. So let’s dive in and take a quick look at these three proposal types.

Be warned, this book is all about writing better *proposals*. We are firmly in the proposal camp and warn against the evils of the RFP. The RFP is another world—another galaxy in fact—and it’s one I have very little experience with.

RFP or Tender: A Request For Proposal or tender (as they’re known in the U.K.) is quite often confused with the typical project proposal that you’ll be learning about throughout this book.

An RFP or tender can contain the same elements as any standard project proposal. You might find:

- Introduction
- Project Overview
- Client Needs
- Project Solutions
- Pricing
- Closing Notes

Similar to a proposal…

So… What’s the Difference?

An RFP or tender is typically used by larger corporate businesses or institutions to find service providers. An RFP outlines the client’s needs, requirements, budget, deliverables, margin width, fonts to be used, and shoe size of the person writing the proposal (not necessarily in that order).

The requirements can be incredibly strict. Should you fail in one small detail, perhaps you use the wrong font (yep, that’s right) or an incorrect margin size, then you can be out of the running, regardless of the quality of your work.

You should also be aware that any RFP you receive will also have made its way to multiple service providers. Like you, these competitors have also been *hand-picked* by the soliciting business.

But where an RFP really differs from a typical project proposal is in the process. Applicants must adhere to the strictest of guidelines if they hope to make it to the final selection. The problem is that you can't always know what the *internal* policies are for accepting an RFP.

Also, an RFP can be a mere formality. Internal policy may dictate that the project stays open to 10 competing service providers, while in fact they have no intention of working with anyone with a staff of less than 12, a turnover of less than $1.5 million and where someone's nephew works in accounting.

RFPs are hard. There's no personality involved and you can't talk to the company like you would a *normal* client. It's unlikely they'll be available to sit down for even a minimal discovery process to really get to the bottom of their problems.

In short, RFPs are a whole different ballgame and not one I recommend taking part in as a creative individual or team.

Not All RFPs Are Restrictive and Evil

It *is* possible to receive an RFP or tender from a smaller company who believes that an RFP is the best business practice. The document will be formatted, as you'd expect, with the usual requirements. It may also be in the hands of several service providers. The difference is that this smaller company will probably listen to alternative solutions and ideas. They may want a bit of personality, and they won't expect you to work to a soul-crushing, highly restrictive system. I know this because one of my best clients came via an RFP.

While you *can* be lucky and find the exception to the RFP rule, you have to know they're the exception. You don't want to invest time and money in a proposal that is doomed from the start.

My advice? **Be wary of RFPs.**

Chapter 3: Why Proposals Fail

> *“The proposal feels boring, generic, and cookie cutter; you haven’t shown them what their world could look like after working with you”. - Marie Poulin*

So let’s get back to what we know best. Proposals!

As creative folks we like to concentrate on being awesome with our clients, and of course, creating!

When it comes time to write a proposal we start to doubt ourselves:

Am I too expensive?

Am I too cheap, too eager, too slow to respond?

Have I understood the client, and do I even know if I can provide real value?

The list can be a long one.

But you might be surprised to hear that most proposals don’t fail because they're priced to high, too low or look like they were thrown together in a badly formatted Word doc. **Most proposals fail because they don’t understand the client's problem.** They fail to convey one simple message:

“My consultant gets me!”

If you fail to understand a client’s problem, you can’t communicate an effective solution. If you can’t communicate an effective solution, then you’re seen as a risk and *not* an investment. Nobody wants to invest in a risk.

As creatives, we like to think that our work can change the world, but if our work doesn’t solve a very specific problem, we’re wasting our time. You need to dig deeper to discover *how* you can help your client succeed.

Weak *“Look at me!”* orientated proposals glaze over the needs of a client and tend to either:

1. Focus on the *bogus skillz of the consultant*. (That’s a Bill and Ted’s reference for you young-uns.)
Or
2. Race to lock in a deal when the client’s exact problem hasn’t been identified.

Neither of these approaches will work in the long run.

Why?

Because even if you’re lucky enough to land the gig, you’re likely to produce work that doesn’t meet or surpass the needs of your client. They’ll be disappointed, they won’t meet their own goals, and you won’t get a recommendation or repeat work.

It doesn’t matter how good your creative chops are, if you can’t pull it altogether in a proposal, then you’re dead in the water.

The good news? The bar has been set *incredibly* low by your fellow creatives.

Seriously, I once had a client describe our community as being "worse than used car salesmen" (I should point out that he wasn't referring to me). When the standard is that low, it only takes the smallest of efforts to stand shoulders above the rest.

A big part of the problem is that many creatives draft their proposals with only the bare minimum of information. They receive an email blast from a potential client with a broad outline of the job description and smash together a proposal, praying they’ll be the first one to get the job.

There’s only one way you can win a proposal like this, and that’s if you’re the cheapest bid for a client that couldn’t give a crap about actually *improving* their business. This quick project grab might feel like high-powered momentum, but when the real problem isn’t diagnosed or addressed, you’ll get the blame when the business caves.

When the hasty creative sees a request for their services in an email, she picks a number—usually her hourly rate multiplied by a rough estimate of the project length—which is packaged up into a Word or InDesign document and sent off via email.

That's it. That's your competition.

And this happens over and over on a daily basis. We’re not taught otherwise.

For years I didn’t know there was any other way to create a proposal. I’d receive the “I need a website” email, the potential client would fill out my project planner, and based on those answers, I’d jump straight into a proposal. Looking back, it was absurd. Imagine building a business for someone based on a quick questionnaire.

The Big Client–Consultant Disconnect

When a lead hits your inbox you typically have little to no connection with the client in question. It's likely he (the client) bumped into your portfolio whilst trawling the Internet for creative talent. He was impressed enough to add you to his list, and off went the “Dear creative...” email.

And here’s the problem...

With no real connection you have no real authority. You're an email address, with about as much influence. This means your proposal will be judged, almost entirely on price. Other than your *mad skillz* (don't count on those to win a proposal) the client has little else to go on. But what could you do? Everything you needed was in the initial client email, right?

Unfortunately not…

At this point, you simply don't have enough information to write a compelling proposal. Until you can establish meaningful dialogue, you'll be one more anonymous, uninformed proposal hitting the client's inbox.

Anything Worthwhile Requires a Little Effort

Great proposals are about pushing back and asking questions, extensively if need be. You should aim to spend as much time as is necessary with a client before you get anywhere near a proposal. Dig deep and push for the truth behind their apparent needs. We'll get to how you do this a little later.

And you know what? **Good clients want you to ask awkward questions** because they want you to understand their business. When you take the initiative to keep asking why, and to push back against the brief (if there was one), you establish yourself as someone who's more than a hack. You establish yourself as a professional. You become somebody who gives a damn about the outcome of their project.

Something that will serve you well, and something I firmly believe is the following: *The more often you can engage a client before presenting a proposal, the greater your chances of hearing the magic three-letter word:* ***YES***.

You see, a proposal acts as reinforcement of your understanding. It's not an isolated product; it cannot *effectively* exist without client input.

Don't believe me? Let's take a look.

Most clients are in a hurry. Therefore most creatives are in a bigger hurry. We worry that if a proposal isn't drafted and sent out by the end of the day, we'll lose the client forever. And in some instances, that's true. But *good* clients (the ones who give a damn about results) are looking for creatives who can help their business improve. They're looking for the creative who understands *why* they need this website or *why* they need this marketing campaign. They need a solution that will move the needle and not just look pretty.

In the hurry to take on new work, it can be tempting to go along with anything a client asks of you. They're paying, so you just shut up and get on with it. But when you blindly accept the word of a client as gospel, you inevitably pay the price. It's happened to me, several times.

You might be thinking, *"This Nathan doesn't have a clue. I've won plenty of proposals without ever talking to the client outside of email."*

But here’s the thing, if you do manage to win a project without digging deeper, you will ultimately fail your client, and here’s why. **A pretty design, a great looking marketing campaign, or an eloquent piece of well meaning copy is unlikely to fulfil the *business* needs of your client.**

This means that as soon as the project is finished and the *real* goals of your client are left untouched--more signups, more trials, more trial to paid, more tweets, more followers, or whatever their real goals are--your client will attribute all blame to your work and lack of understanding about his business.

You won’t receive any more work from them, and it’s unlikely they’ll be making any recommendations or referrals. All this stems from a failure to understand the *real* needs of your client and the ability to communicate this back to them. Repeat work and referrals are the golden fleece of the creative, and they’re both tied to a great proposal.

Finding the “Why” Behind a Project Will Dictate How You Write Your Proposal

Let’s stop all this talk about the *real needs of a client*, and let’s look at an example.

Below is a simplified exchange between a designer and her potential client. It shows that understanding the *real* reasons behind a project can change the entire approach the designer takes to writing the proposal and executing the project.

Client: Hey there, Jenny! I was referred to you by a friend. I hear you’re the person to talk to about a website for my new book.
Designer: That's great. What are you hoping the website will do for you exactly?
Client: Uh, it's my first book so I need to promote it somehow. Duh!
Designer: Okay. It's your first book, and you're trying to generate interest. Have you thought about how you'll get people to the site or what you'll want them to do once they get there? I guess you'll be offering a free sample chapter on the website or some kind of carrot to gather some emails?
Client: To be honest, visits, sample chapters, and social media aren't of much interest to me. I need the website to act as a promotional tool while I'm talking to publishers in the city next June.

Boom!

Okay, so I made that one *really* easy, but if Jenny had taken the request at face value, she'd have written an entirely different proposal and designed a very different website. It’s likely she would have failed to achieve her client’s goal, which was to impress the big publishing houses in the city.

You see, it’s too easy to imagine what a client wants or needs, but a *eureka* moment can change everything. All of a sudden you’ll start to see through the Matrix and you’ll instinctively know how to save the world, or in this case, your client’s business.

Knowing *why* your client needs what they need will set you off in the right direction. It will change the way you look at their project, and it will dictate the solutions you put forward. It will also put you ahead of your competitors before you even begin.

And bear in mind, nobody else has bothered to do this. The other creatives are putting together proposals based on design trends, technical solutions, programming languages, and all kinds of buzzwordery crap that means nothing to the client. Now that you understand your client, you can speak to them in plain English, and you can describe just how you're going to solve their problem.

I hope you can already see how it’s possible to put yourself in a winning position before you even get as far as the proposal.

However, not *all* clients will want to spend time investigating their business needs, and you know what happens to those clients? They end up with an inferior product or service. They end up with something that fails their business on virtually every level. They’ll wish they'd put aside a few hours and talked to someone like you.

Chapter 4: Client Interviews and Why They’re Essential

> *“…It’s got to be about THEM…Their goals, their fears, their budget, their constraints, their bad experiences with other professionals, their pain’s. - Marcus Blankenship*

So, if most proposals fail due to a lack of understanding, what you're probably asking yourself is, *"How can I truly understand what my client needs?"*

I’m glad you asked.

I'm sure when you're first contacted by a prospective client, you have some sort of screening process. Maybe you use a PDF or Word document that contains a list of screening questions. These questions can help you avoid spending more time than is necessary on tire kickers, and you’re wise to do that. But this will only get you partway there.

Find Out What Your Client Wants, and Then What They Need

A winning proposal starts with the client always, no exceptions.

A questionnaire will help with initial screening, but little else. I find it’s preferable to meet in person, which for me means via Skype. If you work remotely as I do, then it’s your only option.

What comes next is an interview with the client, which I call my Initial Client Assessment. It sounds like a big deal, but it’s as easy as getting to know someone. Talk, talk some more, and then talk some more again. Just make sure it’s your client who’s doing the talking. The longer you can engage a client on their favourite topic—that of themselves and their business—the more insight you'll have into their goals and expectations.

There are many reasons why it’s worth making this in-depth Initial Client Assessment a regular part of your proposal process. Probably the most important one for you is determining if your expertise is a good match for this client’s needs. You don’t want to waste time reeling in a job, landing it, and then discovering that you’re going to be miserable or the client is going to be unhappy when it’s completed.

So what should you be looking for, what should you be asking? It's not always easy to start from scratch, so I've put together a list of questions that will help you get the ball rolling.

Remember, **these questions are only a starting point**. The answers can take you anywhere. If the conversation goes in a direction you hadn't anticipated, that's okay. You

want to get to the core of the client's problem. So ask questions, but above all, **actively listen**.

Here's a list of starter questions you can use for your Initial Client Assessment:

- Tell me a little about your business. What do you do?
- Why do you need this website/app/service?
- What problem is this project going to solve for your business?
- What will happen if this project doesn't go ahead? How will it affect your business?
- What results are you hoping to see in your business when this project is complete? What do you want to achieve? Be as specific as possible.
- Where do you see your business in 12 months after completing this project?
- What are your goals for this project? Is it to make money, generate more leads, increase trial signups, increase brand awareness or simply annoy your ex-business partner who's apparently doing so much better than you?
- What sets your business apart?
- Why are you looking to start this project?
- What sort of timescale are you looking at?
- Did you have a budget range in mind? Are we looking at $5k, $10k or $15k? I don't want to waste your time with some crazy proposal.
- How would you measure the success of this project?
- Do you have any way of measuring your current successes or failures? (Analytics)
- What do you think might be the hardest part of this project? What most concerns you?
- What aspects of your current product or service work well? What doesn't work so well?
- What are the short-term goals for your business?
- If this project could only achieve one goal, what would it be?

These questions aim to start a conversation that goes a little further than "When do you need it by??"

You'll be amazed at what you can learn with just a few simple questions. And don't think you're being nosy or too pushy. If a client doesn't want the best for their project, well… there's only one solution for that.

Interview Tips

- I find that it's incredibly helpful to record client interviews for future reference. Repeating a client's problems back to them in the proposal—using language they've actually used—is very powerful stuff. Be sure to get permission before you record any interviews, however. You don't want to create any problems for yourself further down the road. I use Call Recorder for Skype, which does a great job.

- Don't be afraid to be quiet. Ask your questions and let the client do all the talking… seriously. In fact, if you only say four things during the entire conversation, you've probably done a great job!

- You don't need to ask all of these questions, so play it by ear. I'll go into more detail on the whys of some of these questions in the next chapter.

A note on cost requests: If your client asks for a price at this point, resist the temptation to quote on the spot. A lot goes into any project and until you understand just how you can bring value to the table it's best to err on the side of caution. If they really need a number, offer a ballpark figure. Just be very careful not to box yourself in early on. (For more on financial discussions with your client-to-be and your own fears, see Chapter 6 and Chapter 7,)

Chapter 5: 10 Must-Ask Questions for Your Initial Client Assessment

> *“If it ain't broke, don't fix it”. - Anonymous*

As you’re preparing for your Initial Client Assessment, it’s easy to get overwhelmed with either choosing the perfect questions to ask so you can craft a perfect proposal or narrowing down the questions so you don’t overwhelm the client.

After conducting dozen of deep client interviews, I’ve developed a list of essential questions that you should ask and why they’re important. I’ve found this short list usually gets to the heart of the issues you need to know about, both for your client’s success and yours.

1. Why Do You Need This New Product or Service?

It’s common for a client to come to you with a request to create a new website, deliver a redesign, update their codebase, or write up some new marketing copy. But on many occasions they give little to no information about the *reasons* behind their request.

Knowing why a client is beginning a project can change everything. You may be surprised what lies beneath. It could be something as simple as an offhand remark made by a friend that turned into insecurity. Or it could be that they haven't updated their branding in years. The reasons they give may be skin deep, but it's a great place to start digging.

2. What Is This Problem Going to Solve for You?

If you're not solving a problem, why are you talking?

Your client needs to be sure that the work you do will improve their business. While working on projects without a clear focus will pay the bills for a while, it won't establish you as a leader in your field (pro tip: leaders command higher fees). If you want to be the *go-to* person for “X”, then you need to make sure your work improves people's businesses.

This question can also open up further discussion if your client hasn't thought too much about the root of their problem. They may simply be reacting to a comment made in passing and not given a second thought to the reasons behind it. As I’ve said, proposals fail because they fail to communicate understanding. Make sure you and your client completely understand the issues and each other.

3. What Will Happen if This Project Doesn’t Go Ahead? How Will it Affect Your Business?

Again, this goes back to correctly identifying the problem and knowing how you can help. If you have a baseline to start from, then you know what you have to improve upon. For example, your potential client informs you of the following: "We're currently spending $2,500 a month on advertising and in return we get 5 new signups, each worth an initial $15 apiece."

The implications run deeper. According to your client, if they continue to acquire customers at such a high cost, they'll be out of business in 12 months due to lack of funding and a particularly aggressive bank manager. This affects where you should help and tells you exactly what's at stake. It can also give you an idea of how much your help might be worth to their business.

4. What Results Are You Hoping to See in Your Business When This Project Is Complete?

Is your client looking to make more money, generate leads, increase trial signups, heighten brand awareness, look good in front of the boss, or have more time to spend with the family?

This is where the problem they've presented to you and their goals can start to *separate*. If a client tells you they need to redesign their marketing campaign, you need to know why, right? If they go on to tell you you that they're not getting enough trial users into the system, but then say their goal is to increase revenue, you can see that their goals don't *necessarily* relate to the problem they've come to you for.

Sure you can increase revenue by adding more users, but there are lots of ways to achieve the goal of increasing revenue. It’s the client who’s suggested getting more users into the funnel. By digging deeper on these initial questions, you'll uncover all sorts of nuggets. Note down any language, phrases and terminology used by your client. Use the same language your client uses in their proposal. It's a sure-fire way to hit the ground running.

5. Do You Have a Budget Range in Mind?

This is always a hard question to ask, and sometimes a hard one to answer. Clients are afraid that you'll max out their budget, whatever it is. But the truth is, if you have no idea what they're willing to invest, then you may well be wasting your time (and theirs).

As a side note, regardless of a client's budget I will *always* include at least one price option that comes in *over* their budget. Tiered pricing (which we’ll discuss in Chapter 14) can increase your chances of upselling a client, bring *more* value to their business and more revenue to yours.

Try framing the question as, "Do you have a budget range in mind? I don't want to waste your time with some crazy proposal. Are we looking at $5k, $10 to $15k?”

Softening the tone can help a client feel more comfortable in giving out a ballpark figure. Giving a budget range isn't as scary as a definitive dollar amount. Proposals take time to research and write, so don't waste time on a client that's going to say “no” anyway. If you get rejected for being too expensive, there’s only one person to blame.

6. How Will You Measure the Success of This Project?

This question is extremely important! You need to know that you can make the project a success, therefore you need to determine *how* you can measure a project’s success.

Success can mean many things: More signups, more people on their mailing list, more revenue, a lower churn rate… in fact, it could be anything, as long as there's a way to measure it.

A healthy ROI doesn't have to be quantitative either. A qualitative return can be just as valid. You want your client to succeed—and have proof—whatever form that success takes. Get *them* to tell *you* how you can succeed.

7. What Concerns You Most About This Project?

There will usually be aspects of a project that worry your client more than others. But why does this matter to you?

If a client is nervous, then it's your job to put them at ease. Closing a contract is all about identifying and calming fears. If a client doesn't trust you to cure whatever ails them, then you'll have a hard time being successful.

This question will also give you insight into what could be some of the underlying problems behind their initial outreach. The more you know about your client, their project and concerns, the better you can advise.

8. What Aspects of Your Current Product or Service Work Well?

A wise man once said "If it ain't broke, don't fix it."

Knowing what a product or service currently does well is worthy of your attention.

Let’s look at an example: A UX designer is called in to redesign a client's product. She's a talented designer and has a great feel for user experience. However, she doesn't take into account that for the last 12 months her *client's* users have been creating reports a certain way—a way which they both like and feel comfortable with. The designer steps in, unifies the

entire experience, makes it look fantastic... and unintentionally alienates half of the users in the process.

Be careful. Don't wreck your client's product or service in the process of building a new one. Know what works, what doesn't and why. **Forewarned is forearmed.**

9. If This Project Could Achieve Only One Goal, What Would It Be?

This is where you find out what really matters. What's at the heart of all this? It helps your client to really hone in on the problem.

If I was to take Nusii as an example, I'd say our priority is to help creatives win more projects with their proposals. Everything else is secondary.

Every project will have primary, secondary and even tertiary goals. Hitting those goals is of the utmost importance to your client's business, *and yours*. Knowing what these goals are can only come from talking to your client.

Be insistent. If they don't have a clearly defined goal, your job is to do all you can to help them find that goal. How will you succeed otherwise?

10. How Did You Hear About My Services?

This question is often overlooked, but knowing where your clients find you is important for obvious reasons.

If a certain channel is bringing you more leads than another, *work it even harder*.

If a client came to you via a referral, then you'll want to thank that person (even if the project doesn't pan out). If they found you via an article you wrote, a product you created or a Google search, you'll want to know.

In any case, this question is a quick tool to give you essential information about how you're connected and regarded in your area of expertise.

Closing Notes on Client Interviews

Ultimately it's on you to find out what your client needs. If you go in guns-a-blazing and end up disappointed, you only have yourself to blame.

If you don't think you can actually improve a client's business, should you even take on the project? I'd say probably not. But without asking these sometimes awkward questions, it's impossible to know otherwise.

Chapter 6: Nailing the Budget Question

> *“If someone doesn’t want to reveal their budget to me, it is a bit of a red flag”. – Dennis Field*

Client assessment interviews are a skill we learn over time. Even the most timid of creative professionals can learn to enjoy them (I speak from experience). But there’s one question that makes the stoutest of creatives stutter and stammer.

What’s your budget?

Writing a proposal without knowing your client’s budget is a *terrible* waste of your time. Nail this *before* you put pen to paper and you will put you in a far stronger position to win the proposal and subsequent project.

Of course, it’s not usually the budget question itself that causes creatives to clam up, but rather the objections we think our clients will give in response.

So how do you get your client to answer the question of budget?

I asked eight of the creative industry’s top dogs two very direct budget questions:

1. “How do you approach the question of budget with your clients?”
2. “What do you do when a client resists revealing their budget?”

Here’s what they had to say.

Paul Jarvis of The Creative Class

How do you approach the question of budget with your clients?

I skip the back-and-forth by listing what my pricing starts at on my website on the homepage, the about page, and my portfolio page. It clearly says I don't work on projects under $X. That way, if a client doesn't have a budget of at least $X, we don't waste each other's time. Plus, if they do proceed, then they already have some idea of what the price will be, so it's much less scary since we both know we're on about the same page (or at least the chapter, ha). So listing my pricing on my site skips having to deal with budget questions, and then brings it down to specifics.

What do you do when a client resists revealing their budget?

If a client won't tell me they have at least what my website says, then I'm not sure why I'd work with them. I only work with clients who trust the process and collaboration. I can't

remember any clients that haven't revealed their budget to me though. Maybe that's because I'm so upfront with my own pricing.

Kurt Elster of Ethercycle

How do you approach the question of budget with your clients?

I base my budgets on the value that client will receive. An ideal project budget represents a huge ROI for the client, and equitable compensation for me. One way to establish that value is to ask, "What's the impact to your organization if you don't complete this project?" An indirect way to ask and gauge the state of the organization is to ask, "Why start this now vs six months ago or six months from now?" That's a great question which reveals volumes about motives.

What do you do when a client resists revealing their budget?

When writing a one-off proposal for a client, I do need to know their budget. And many people will resist revealing it because they believe I'll just bill whatever amount they reveal. Initially I'll ask outright, *"What have you budgeted to achieve your vision?"* or *"What have you budgeted to ensure your project's success?"* If they resist, I'll press with a range intended to shock. *"Is it closer to $5K, $50K, or $500K?"* That question often works.

Nick Disabato of Draft

How do you approach the question of budget with your clients?

I ask what the overall budget for the project is. That way I can find a way to calculate the interaction design portion based on that. For some reason it seems less threatening to do it this way.

What do you do when a client resists revealing their budget?

I usually walk if they get obviously uncomfortable about the prospect of buying design. Enough clients come my way that I can select for honesty.

Dennis Field of The Designer’s Handbook

How do you approach the question of budget with your clients?

To me, I don’t make budgets an issue. They shouldn’t be. The simple fact is that the proposed clients and I are expected to work together to create the best solution possible. This starts from the very beginning of the relationship.

My approach is to lay out my terms and gauge if that fits within their expectations. If not, we know upfront and we can look at alternative options for them (usually referring them along to someone else). I like to be honest and ensure from the start we’re on the same page. If a

proposal is needed, I'll ensure I have the full scope and then only craft the full proposal once I've given them what they can expect from an investment.

It does me no good to play the guessing game when it comes to creating an estimate or proposal. It's a ton of wasted time and energy, and I've learned from my experiences that you can get sucked into proposal creation mode with prospects. I'm up front that only if they need it and are ready for it, will I draft it. The chances of closing that deal is much higher, because the proposal is just outlining the detailed expectations of the project. They've already been sold prior to the proposal process even begins.

What do you do when a client resists revealing their budget?

If someone doesn't want to reveal their budget to me, it is a bit of a red flag. We've all been in the situation where a prospect says "Hey, I'm not really sure of my budget." You then craft a detailed proposal for them to respond with, "Well, I was thinking it would be half that cost."

Seriously!

Now what do you do? You're in a spot where you either come down to their number (which sadly many do) and give a ton away for free, or you have to walk away after wasting hours drafting the perfect proposal and trying to guess at what they had in mind.

I believe this is a bit of a tactic, so what I do is let them tell me what things are valued at, I let them know up front what I'm valued at by giving them past examples. More often than not they'll either say "Eeek! That's out of budget." or "I think that's doable. Let me confirm and I'll be in touch."

So to answer your question, if I do ask it's only because I'm having doubts and we need to get to the numbers before I can continue. If they refuse, I let them know that it's important so I can ensure that we can deliver the appropriate solution for them. I stress that our job is to work together on the best solution possible for your company. If I can't work with your budget, I know someone who may.

The important part of working with clients is the relationship part. In any relationship you have to ask the tough questions to get to the next step and to trust one another.

Keith Perhac of Develop Your Marketing

How do you approach the question of budget with your clients?

It really depends on how the client got in touch with us. If they're a completely cold lead, I try to set expectations that any project they do with me will probably need a budget of over $10,000. In my experience, this seems to be the magic number, as it weeds out clients who are not serious about the project. I get a fair share of one-off emails from people who want Etsy clones and who have a budget of $1k - $5k. Setting the lower limit for a budget also makes sure that I'm not going to be spending hours on the phone and creating custom

proposals and then have the client say that they have no money. (I've actually had this happen once, where a client said they thought the $10k minimum was just a guideline, and that we could do the project for $5. Sometimes I don't understand people.)

For warmer leads (like referrals) I'll always get on an initial call, mostly because I love talking to people about what they're doing. During the call we'll talk about initial budgets, see what they're looking to spend, and try to work out what we can get done for that amount.

I used to be really nervous whenever I got to the topic of money, and not want to even broach the subject. Sometimes I'd even start working on project before we decided on a budget.

Not. A good idea.

At this point in my career, there are more people who want to do things with me than people I have time to work with. That doesn't mean I have a ton of clients with budgets—it means that there are a lot of people who want to do things "as a partner" or "for equity." As much as I wish I had that much availability, I just don't—and it has forced me to have the budget conversation earlier, and be more direct with clients about what they can expect to spend. And in the end, people are much more appreciative of that. They don't want to spend 6 weeks thinking they're going to go with a developer and then find out that they're too expensive.

Set expectations early, and I find that everyone is happier.

What do you do when a client resists revealing their budget?

I can understand why clients are reluctant about giving out their budget. It's the same reason that a lot of developers are reluctant about giving out a proposal without hearing a budget first!

When a client is talking to you for the first time, there's an anxiety that they're going to be taken advantage of—that if they say the budget is $20k, that the quote is magically going to come it at $19,950, even if the deliverables aren't worth that. And I respect that, as it's a very real fear. Working in enterprise sales for 6 years has shown me that budget is a delicate balancing game on both sides of the table. Because negotiations have to start somewhere, I am usually happy to give a preliminary budget, with the full expectation that this will change as we further define scope.

This sometimes goes well, and sometimes doesn't, but at some point someone has to put out the first number. Because development budgets are always woefully underscoped, I choose a project that I've done in the past that has a similar scope, and increase the budget by about 25%. That gives us a little wiggle room so that we can go down to match a client's budget, while assuring us that the client has a realistic budget in mind in case things go over.

Marie Poulin of Digital Strategy School

How do you approach the question of budget with your clients?

I indicate a “starting at” price on my website, so most people who get in touch already have a rough idea of my pricing. This decision weeds out a lot of low budget clients, and prevents issues with the client revealing their budget.

At the point that they are contacting me, they already are committed to “investing” in their website, and they know they need more strategic work, so my proposal is not going to end up in sticker shock.

I think one way you can really start to open up that conversation is by just being very honest. I usually say something like, *“Getting a sense of your budget gives me a better sense of the recommendations that I can make and what’s possible. We can achieve a lot or a little depending on how much you want to invest, and over how long. How deep I’ll get into your strategy and features will depend on your budget, so let’s get a sense of what would be feasible for you over the next 3 to 6 months."*

I think the car dealership analogy often makes sense here: if you want into a dealership, you already have a sense of what you can afford. You can't expect a Jaguar if you have a budget for a Ford. Get to the money conversation early, and don’t beat around the bush!

Philip Morgan, author of The Positioning Manual for Technical Firms

How do you approach the question of budget with your clients?

Earlier on in my freelance career, I always avoided talking about money with my clients. This had negative effects on me, the project, and my ability to get paid in a timely fashion every time. Business is about more than money, of course, but... it's also about money. I'm pretty sure it was a combination of Brennan Dunn writings and Blair Enns' *Win Without Pitching Manifesto* that got me past that limitation.

So now, I approach the question of budget through a process that begins during my first conversation with a prospect. I make it a point to ask: "How does your business make money?" It's a very simple question that gets the potential awkwardness of discussing budget and money off the table right away. It's phrased in a way that's not nosey (for example, asking "What is your salary?" would be the wrong way to discuss money because it's perceived as nosey). If I've been discussing money issues with my client from our first conversation, then later when the issue of budget for my work comes up, it won't be the first time we've mentioned money!

Of course, I try to only do work that has a clear financial payoff for my clients. But even if the work doesn't have that clear payoff, discussing project budget is a lot easier if you have the context that the "How does your business make money?" question will provide you. If that question has revealed to you that your potential client makes tens of millions in revenue and they're arguing with you over spending a few thousand more on your work, you have lots of ways you can address their budget objections.

What do you do when a client resists revealing their budget?

This hasn't happened since I started using the approach I describe above, but if it did, I would take it as a sign I have not earned my prospective client's trust and I would not move forward in the sales process until I had earned their trust. Trust is not a binary "mistrust" vs "completely trust" thing. It's possible to earn trust in small increments.

That's why I like to start not by asking "What is the budget for this project?" but instead with a more "safe", general question of "How does your business make money?" If a prospect is very guarded in their answer to this question, I know I have more trust-building to do. On the other hand, if they reveal revenue and profit margin and cost numbers right away, I know that I am further along in earning their trust.

Earlier in my career, I would treat every prospect as a potential "whale" and every project as my only chance ever to land and eat that whale (I think doing a bit of agency work trained me to think this way). Since then I've realized that it's often better to think in terms of the smallest possible increment of improvement I can make for that client and propose that. The client and I can always ride the wave of success from a small, successful project into more ambitious engagements in the future. So this is another way to deal with the trust issue. Build it in little increments.

So to answer the question plainly, if a client resists revealing the budget, stop pushing, assess the situation, and find a small way to build trust with them. Maybe that's a so-called "roadmapping session", maybe it's a smaller version of the project you had in mind, and maybe it's just simply saying, "Maybe now's not the right time to discuss budget. Could you instead help me understand how this work will benefit the business? I'm always interested in knowing how I'm making my clients' lives better."

Eric Davis of Little Stream Software

How do you approach the question of budget with your clients?

I bring up the budget discussion early on in our conversations, sometimes in the first or second email. Many clients are dodgy about their budget but we cannot start a project without addressing it. The exact question I use is:

"Do you have a budget you've set aside? Budget is usually the hardest question here, but it's something that I need to at least have an idea on."

What do you do when a client resists revealing their budget?

Some clients will just tell me their budget when asked. These are great because I can explain how much my services are and we can both decide if there's a match. Worst case is that there isn't a match and we don't have to invest any more time into the discussion. Since they were open, I'll do my best to refer them to someone who is a better fit.

Many times a client will dodge with a response like “We’re willing to pay a reasonable amount for quality work," which frankly is true for every single business transaction.

When I get a response like that I push back and try to get a range. I'll even tell them my weekly rate to see if that shakes anything loose.

"My weekly rate is $5,000 so I need to at least have an idea on what you're comfortable with. A ballpark figure or range is fine. Are we talking $1k, $5k, $10k, or $25k?"

If they still won't tell me their budget, then I walk away. Consulting is based on trust and if there isn't even enough trust to have a conversation about how one party is compensated, the rest of the sales process and project is going to be a struggle.

If it comes to that, I’ll say, "It's your decision to not tell me what you've budgeted for this project. But in order for this project to be a success there needs to be a level of trust and openness between us. Dodging such a fundamental question like the project budget is a major red flag for me, so I'm going to have to pass on this project. I wish you well and would look forward to hearing about your project’s success."

The Common Thread

From these eight snippets alone, we can see a few common threads that help us get to the bottom of the budget problem.

1. Bring up the subject of money early and often. Don’t be shy.
2. Be as direct as you can.
3. When asking for a budget, suggest a few ballpark figures.
4. Try orientative pricing on your web site to establish your minimum working fee.
5. Never let the budget question go unanswered *past* the first client assessment.
6. Don’t be afraid to say goodbye to clients who are unwilling to give their budget. But if their budget doesn’t work for you, refer them to another consultant who can help.

In the end, it comes down to repetition. The more you can ask the question, the easier it gets. If you're really nervous, try standing in front of the mirror and practicing variations of the question. It can help you to feel more confident when the moment of truth arrives. Stand tall and ask with confidence!

Interview with Kai Davis: A Proposal Workflow That Puts Clients First

How would you define a proposal and what part do proposals play in your business?

At their core, proposals are a way to communicate value and reduce risk.

Sounds reasonable, right? But what value and what risks are we talking about?

Proposals are a way for you to communicate the value of *the project* to the client and *reduce your risk* as a consultant.

When you're engaging to work with a prospect, your biggest struggles are to:

- Communicate the value that the project offers to the prospect's business
- Reduce the perceived risk of working with you as a consultant

Some consultants think about these concepts backwards.

They focus their proposals on communicating the value that *they* bring as a consultant—including countless case studies, testimonials, and portfolio examples—instead of focusing on:

- The value that a successful engagement would bring *your prospect's* business
- The value *your prospect* would be losing if they did nothing
- The value that the project means to *the prospect*, personally
- The value that *the prospect* would be gaining if they worked with you—instead of with another consultant

Proposals are a critical part of my business—but I approach them a bit differently than most consultants.

I primarily offer fixed-scope, flat-rate projects ("Productized Services") on my website, presented as a sales page.

For me, a typical proposal is a sales page. On that sales page, I outline who the project is for, the problem it solves, and the solution that I'm making available.

However, if a prospect is interested in working together on a custom engagement—something higher-priced and created just for them—I follow a standard workflow in researching and writing a proposal:

- First, the client and I have a 60-minute phone conversation, exploring their needs and determining if I'd be able to help them meet their goals.

- Then, we go through a paid Roadmapping Workshop, exploring their business and goals in depth.
- After that, I produce a traditional proposal for the project, based on their needs. In that proposal, I communicate the value present for their business if we were to work together.

  By moving through this process, I'm able to understand the benefit to my prospect's business, the risk of the project failing, and the value that I—uniquely—contribute to the project.

What did your first proposals look like, and has your approach changed over the years?

My first proposals were abominations.

When I was writing my first proposals, I committed every sin in the book. My proposals were:

- Focused on *me* and *my experience*, not the benefit or value to the client
- Long, rambling, and full of testimonials and portfolio pieces
- The product of hours and hours in InDesign, instead of a rational and ordered exploration of the client's business.

Abominations. Each and every one of them.

Now? My proposals are a 180º transition from how I originally approached the process.

In a nutshell, here's the key point: I switched from writing a proposal about *my business* to writing a proposal about how *the prospect's business* would improve when we worked together.

Now, when writing a proposal, I advocate a simple, repeatable approach:

- Interview the prospect to identify their business needs and goals and what the project means to the business and them personally.
- Understand why the prospect wants to work with you, dear reader, instead of selecting another consultant. To do this, ask questions like those in Nathan's Initial Client Assessment that help you understand the unique value that you and you alone can bring to the project.
- Help the client explore other, more affordable alternatives than working with you. Why not do the project internally? Why not start now—instead of six months from now? By asking your prospect to answer these questions, you position yourself as an expert and make it clear you're focused on improving the client's situation, not just landing them as a client.
- Write the proposal to focus on how you will improve the client's current situation and the benefits the client will receive as their situation improves.

Everything about my approach to proposal writing has changed. I'm focused—as much as I can be—on how I can improve the prospect's situation and what that improvement would mean for their business.

Now, instead of being an abomination, my proposals are, to quote Raoul Duke:

> *A high-powered mutant of some kind never even considered for mass production. Too weird to live, and too rare to die.*

Did you experience a moment when the lights came on and it suddenly all clicked? A eureka moment?

There wasn't a single eureka moment, but more a collection of individual "eurekas" that added up to a change in my philosophy: proposals aren't about me, my business, or my experience. Proposals are about *the prospect*.

Proposals exist to:

- Communicate the value that the prospect will receive by working with you.
- Offer multiple options for how you can best work together.
- Set expectations for the engagement, both in terms of the prospect's expectations for you and your expectations for the prospect.
- Offer a clear next step and timeframe for working together.

Getting the right information from a client can sometimes be a struggle. What's your approach to client interviews?

I move through three phases to interview a prospect and get the right information from them:

- First, when I connect with a prospect, I send them a short email to schedule a time for us to talk. I also ask them to answer a few additional questions about their business.
- Then I interview them over the phone about their business. I ask them a series of questions to identify the pains they're experiencing—and the value that would be present in removing that pain.
- Finally, if the prospect isn't a fit for my flat-rate, fixed-scope consulting offerings ("Productized Services"), I propose a Roadmapping Workshop. These workshops are a way for us to review the outcomes the client wants to achieve and discuss the options for them to get there—and then, separately, prepare a proposal.

There are a number of benefits to starting work together with a Roadmapping Workshop:

- The client and I get to know each other on a professional level—and they get to see what it's like to work with me.
- We begin bridging the gap between the outcomes the client has in their head (more traffic, more sales, increased revenue, better image) and the project itself.
- They walk away with a handful of radically new ideas that will get them even closer to the finish line.
- I begin to understand their business—and what the stakes are if this project fails.

Through these different phases, I'm able to interview the prospect and understand how I can contribute value to their business.

After sending out a proposal, how much time do you let pass before reaching out?

When I send out a proposal, I include a short paragraph to set expectations for when I'll be following up with them. Typically, I say something like this:

I'll follow up with you by phone this coming Thursday to confirm that you've received the proposal and answer any questions that you have.

Then, I'll follow up with the client every 7-12 days, checking in on the proposal, and gently nudging the conversation forward. You can use tools like Boomerang, Streak, or FollowUp.cc for this.

Many creatives struggle with pricing. How do you deal with this in your proposals, and do you ever work with value-based pricing?

I take two different tracks:

- For my flat-rate, fixed-scope offerings ("Productized Services"), I have a flat rate that I charge for the service.
- For my custom proposals, I figure out the potential upside to the client's business and use that as a *price anchor* for my weekly rate.

For my flat-rate, fixed-scope offerings, I leave the pricing/value decision in the hands of my prospect. If they believe the value that they will receive by working with me outweighs the price of the project, they'll buy. If not, they won't.

For my custom proposals, I've tried pure Value Based Pricing, but I prefer to use Value-Based *Anchoring.* (See Chapter 14 for details on Value-Based Pricing and Anchoring.)

With this strategy, I anchor my weekly rate against the value present for the prospect's business. I've found that this approach produces better results by anchoring the value of the project to the benefit to their business and not locking me into a fixed rate for the project.

What are the top reasons for a proposal being rejected?

You, as the consultant, failed to reduce and eliminate the risk the prospect perceived that they would experience by working with you.

Put yourself in your prospect's shoes. When you send them a proposal, you're saying, "Hey, buddy, I think we can achieve XYZ—if you *trust* me."

If your prospect *does not* trust you, if your prospect thinks that you're a risky bet, they'll be shy about working with you. That will result in them choosing a consultant that they trust more.

Early on in the discovery process, I ask the prospect questions to understand the unique value that I could contribute to the project. Here are three questions that I ask:

- Why me? Can any consultant do this, or do I have special attributes?
- Why now? Is the timing particularly urgent or sensitive?
- Why is this being handled in this manner? Is there some aspect that's key at this moment?

By asking these questions, you'll be able to understand better the unique value that you and you alone can contribute to the project.

Once you understand the client's situation, you'll understand the value you can contribute to the project. From there, you'll be able to address and downplay any risk they perceive in working with you.

Some creatives prefer to send out a one-page proposal, whereas others compile 30-50 pages replete with case studies, portfolio examples and testimonials. What are your thoughts on this and how do you approach the subject of proposal length?

I prefer short proposals. In my opinion, a proposal needs to contain four core elements (sections):

1. **Project Overview**, where you explain what's at risk to the prospect and what the prospect will gain by working with you
2. **Project Options** for the client to select from. Typically, I split this into an "A", "B", and "C" option, at different price points.
3. **Risks and Assumptions** so the client can understand your expectations about the project and any contingencies.
4. **Terms and Conditions**, including the pricing for the options you're proposing.

That's it.

When you're preparing a proposal, there's one key question you need to answer before you add any section or paragraph: **Does this information directly relate to how the client's current condition will improve?**

If the answer is "No"—as is often the case with proposals that include multiple testimonials, case studies, and portfolio examples—then ruthlessly cut out that content.

Here's a harsh fact: **The client doesn't care about you.**

The client only cares about their business. How do you play into this cold reality? By illustrating how you can help improve their business. Focus on **that** in your proposal.

If you could give one piece of advice to creatives who are new to proposals, what would it be?

Use Your Words!

Interview your prospect. Ask them questions like:

- How do you run you business?
- What do you do to make money?
- What keeps you up at night?
- How will they know if the project was a success?
- What would a home-run (success) look like if you work together?

Then, as you write your proposal, repeat their answers back to them as part of your proposal.

Tell me how improving your proposals has changed your business.

By improving my proposals, I'm working with better clients, charging higher rates, and spending less time on individual projects. I'm focused on working with only the best clients, and by improving my proposal writing process, I've been able to 'weed out' the bad fit clients, focusing on my 'dream' buyers.

In short, by improving my process for writing proposals, I've improved my overall business.

About Kai

Kai Davis helps experts like you grow your audience through Digital Outreach. He helps you by taking care of the details: looking after your most valuable relationships and helping you build new ones. He writes about how you can increase your traffic, grow your audience, and make more sales at doubleyouraudience.com

Chapter 7: Preparing for Your Initial Client Assessment Interview

> *“Don't try to be what you're not. If you're nervous, be nervous. If you're shy, be shy”. - Adriana Lima*

Jumping on a call with a potential client can be an uncomfortable experience, by anyone’s standards. Nerves set in and your mind goes into overdrive. But these initial interviews are crucial to the success of your proposals, really.

The Overeager Creative

When I first started in the freelance world, I’d jump on any “Dear Designer” email that came my way. I did because I needed the work. But of course, do this enough times and you soon realise that you’re throwing billable hours down the drain.

If you’ve never seen a “Dear Designer” email, take a look at this example. I’m sure they exist in every creative sector:

Dear Designer,

I was searching for web designers when I came across your portfolio. I really like your work and I’d love to get a quote from you for my upcoming project. I’m looking for someone to help me redesign my current web site which is looking pretty dated. Here’s a little info about what I need:

- *Redesign of current site: www.somewebsite.com*
- *Should include:*
  - *Portfolio/gallery page*
  - *Contact*
  - *About*
  - *Home*
- *Be responsive*
- *Have links to my social media accounts.*
- *Be flat :)*
- *Be live by the end of the month*

I’m not sure what this should cost, so I’ll be talking to several designers. I’d love to get a price from you as soon as possible.

Thanks,

A potential new client

Back in the day I would have opened up InDesign, whipped out my snazzy proposal template and jumped straight in. I'd write a quick "job spec" fill it with line items and send it off before the day was out. I WANTED THAT JOB!

Of course, by doing this I was competing with all the other Joe and Janet Freelancers who worked the same way. Nothing I could do here would set me apart. I'd be judged on the sum total of my line items and little else. So if most freelancers are willing to jump straight onto any new work that lands in their inbox, how can you be different? What can you do to stand out?

You can start by learning more about what your client needs. There's no way on earth I could have enough information about a client's project from the above email. It's impossible. Even if I were to be *chosen*, there's every chance the client would have been disappointed with the outcome. Why? Because I had no idea what the outcome should look like. A feature set won't hit any goals if you don't know what those goals are.

Get on the Phone and Talk

Talking to clients is how any successful project starts, not via email. I'd even say that 99% of your proposal is "written" in this very first chat. If you can spend enough time talking to your client and learning about their business, you will seriously increase your chances of writing a more compelling proposal.

There's no bigger waste of time than a back-and-forth email conversation trying to book a meeting time—especially if time zones come into play. So do yourself a favour and set up a Calendly account to help you organise your meetings. Your client will even comment on how cool it is and you'll immediately score brownie points.

Add the times that you're available to meet, and send your personal Calendly link to the client. As soon as they choose a time that suits, you'll get a nice little email notification and an updated slot in your calendar. This seemingly minor detail (of including an automated booking service for your meetings) gets you a proverbial tip of the cap from your client for having a professional contact process.

Make sure to include your Skype or Google Hangouts address before the meeting time. Those last minute "What's your Skype name?" emails can lose you a couple of points on the client satisfaction scale.

The Moment Arrives: Managing the Call

Yes, client meetings can be nerve-wracking, and yes they can feel unnatural. But do you know what helped me overcome these nerves?

Switching roles.

In the corporate world, you go for an interview, and you sit in the hot seat for an hour or so and are subjected to a mild form of interrogation. However, when you're gauging the suitability of a client for *your* services, the boot is squarely on the other foot. It's your turn to do the interviewing, it's *you* who decides whether they get to work with *you*. This subtle shift in mindset can really help to make a difference.

Here are a few basic rules to help any client interview go smoothly:

- Try to treat the meeting as a casual conversation. It's pretty easy to get people talking about what ails them, so you probably won't need to say much at all. However, as we've already mentioned, it's a good idea to have your questions planned ahead of time. Outside of that, just go with the flow.

- Be aware that it's easy to get off topic. If your client brings up something interesting, put a pin in it and come back to your planned question later on.

- Please, please remember to record your meetings. Yes, I've mentioned this already, but it's so valuable. If there's a lapse of a week or two between your initial meeting and the time you sit down to write the proposal, chances are you'll forget a lot of crucial information.

  This recording will give you unexpected insight into comments that were seemingly made in passing. You'll notice changes in tone of voice when they talk about certain pain points and you'll have the added advantage of being able to note the exact language they use to describe their problems.

That Sticky Question: Discussing Money

We've already looked at the subject of budget in Chapter 6, but as it's generally the most uncomfortable part of any client interview it's worth repeating.

Polite society says you don't ask about money. We feel we're being direct or just plain rude. To ease this sense of awkwardness you can soften the question by asking for a price range instead of a fixed budget. I often ask something like this:

> *What budget range did you have in mind? A ballpark figure is fine. I don't want to waste your time with some crazy proposal.*

If they don't go for that, try asking for a range and offering up some starting figures.

> *What budget range did you have in mind? A ballpark figure is fine. Are we talking $5k, $10k or $25k?*

Giving a range allows your client to place themselves in a bracket without firmly committing to a fixed figure. They might say, "Well, we're probably between $5 and $10k, but it depends on X…".

This is a great start. You now know they have the budget to work with you. You also know enough about the project to know that it interests you and that you can help.

What about when your client asks how much you'll charge? Should you give a quote during an initial meeting?

The simple answer is no, you shouldn't.

Giving an indication of cost at this point can be dangerous. After a smooth, productive meeting with a client, it's easy to be tempted to tip your hand a bit, but there's still more work to be done.

Locking yourself into a price commitment now would be doing both yourself and your client a disservice. You still don't know enough about the project and how you can help. This is why recording your meetings is such a great habit.. When you re-listen to past meetings, you may well discover different problems, or even new avenues of interest that hadn't occurred to you during the interview. Further digging may be required, along with another meeting or two, so don't make promises too quickly.

Sorry to bother you, but...

Many consultants suffer from a common ailment: Botherance Factor. We worry that we're annoying our clients with too many questions. We worry that they'll get cold feet and have second thoughts. And sometimes you're right to worry. If, however, a client isn't interested in taking this initial discovery stage further, you're probably better off parting company.

Any project is a collaboration, so forget about disappearing into your bat cave and surfacing two weeks later with "The Deliverable". It doesn't work, believe me. The fewer surprises, the better. You *and* the client will be working together on this from beginning to end. So ask lots of questions now.

Can't I just send a questionnaire?

Nope. It's very unlikely you'll make any sort of a personal connection with your client by sending a huge form. Business is about building relationships and creating trust. It's difficult to trust a form, no matter how well designed… and email is not much better.

Email is the best place on earth to lose all context. How many times have you lost your temper with a client after reading a request that used a "tone of voice" you didn't appreciate? The same request made in person would probably have come across as courteous and maybe even sensible. For the majority of us, tone and inflection doesn't translate well into the written word.

Email, forms and questionnaires have their place in our line of work, they just don't have any place in getting to know a client's needs.

Yes, your first meeting with a potential client can be scary, but the more you do, the easier they become. You'll start to build a system and things will fall into place.

As technology advances, and we become more and more connected (read: less and less connected in person), it's doubly important that we understand the needs of our clients. It's nearly impossible to achieve this kind of understanding without a good old-fashioned chinwag.

Chapter 8: Speak Plainly

“If you can't explain it simply, you don't understand it well enough”. - Albert Einstein

If you want to get your nerd on, do it amongst other nerds, not with your client… unless they’re a nerd, too. Each business has its own secret language that only those on the inside understand. The problem is that sometimes we’re so involved in our own world that we forget about the rest.

If you've ever tried to buy a car, then you may have experienced this yourself. Salesmen talking to you about things you have no clue about can be very off-putting. If like myself, you don't know a lot about cars, you’d probably feel quite lost, a little stupid and perhaps even intimidated. In short, you’d be put off buying from that dealership altogether. And who can blame you? They didn’t have *your* best interests at heart.

The Best Salespeople Don’t Sell

The best salespeople can communicate an idea or concept in terms that their buyer will understand.

Back in 2001 when Steve Jobs presented the iPod, he didn't shove some ground-breaking technical solution down our throats, he sold us ”1000 songs in your pocket". It was easy to understand and got straight to the point. You didn't need to care about the technicalities to appreciate the benefits.

If we go back to our car salesman, what could he have done to make me feel that he had my best interests at heart?

Well, he could start by asking me what the car was for, right? Trying to sell a sports car to someone who has to do the school run twice day is unlikely to end well.

Asking questions can actually help form trust.

So what do you need the car for? Will it be for a daily commute, family holidays, cross-country drag racing?

If a salesperson uses language that is clear, and can offer a product that will truly benefit the buyer then he’s far more likely to make a sale without “selling”. Dropping the techno-babble allows the potential buyer to:

1. Trust them
2. Buy from them (or at least consider them as a serious option)

Adapting Language to Reflect Your Clients' Tone

Most people have a natural tendency to adapt the language and tone of the person or group of people that they're addressing. Not *everyone* does this, but it's certainly something I've noticed myself do over the years.

Even though I've lived outside of Wales for more than 20 years, whenever I visit my hometown, my dormant Welsh accent springs back into action.

When I talk to my mum, my tone of voice and vocabulary changes. When I talk to my dad, it changes again, usually for the worse.

When on the rare occasion I catch up with friends over a beer, my tone and vocabulary morphs once more.

I'm the same person to all of them, but I relate and interact with each of them on different levels.

We constantly adjust our language to fit into a multitude of situations. It's natural, and a proposal shouldn't much different.

When it comes to clients, never presume. No jargon, no BS. Speak clearly, it's in your job description (check the small print).

Legalese

> *"But do not give it to a lawyer's clerk to write, for they use a legal hand that Satan himself will not understand". - Cervantes*

The word alone makes me want to stop writing this chapter. The Oxford Dictionary describes legalese as:

The formal and technical language of legal documents

Yawn! If you search online for any kind of generic proposal template or document then you'll more than likely find one replete with all kinds of nasty legalese. Lawyers aside, nobody understands that stuff! I certainly don't.

So why mention legal gibberish?

When we first start dabbling with contracts, work agreements and proposals we tend to take the first thing we find online and run with it. Legalese documents look official, and we like how they make us sound: professional. The thing is, nobody understands a bloody word.

If You’re Not Being Clear, You’re Losing Trust

As we’ve seen over and over, one of the most important things you can do when writing a proposal is to use language that your client understands. Taking language used in client interviews is a great way to facilitate the process.

When a client reads a proposal that uses their own vocabulary they can more easily identify with the proposal and see themselves reflected.

Legalese will not do this.

We find it so much easier to trust in someone’s capabilities when they are capable of explaining a problem in a way that you, a novice, can understand.

I was never any good at Maths. My head refuses to co-operate. Just last week I was talking to my brother-in-law about how to set up a company in Spain. These kinds of things send my brain spinning and ordinarily I switch off, but he managed to explain the intricacies of the process without making me feel like a complete idiot. That’s someone who knows their business.

When you can be that calm, knowledgeable voice of reason for someone--at their level--then you’ve immediately established yourself as an expert *and* created a level of trust that layers of complicated words and a fat portfolio couldn’t.

Chapter 9: There is No ‘I’ in Proposal

> *“A proposal is not about you and your work, it's about what the client needs, what you propose to solve those needs and why you're the best person to do it”. - Ilise Benun*

I'm sure at some point you've received one those spammy emails from a questionable offshore outsourcer. These are the folks who offer you every service under the sun.

As you’ll see, the focus is entirely on the provider. You never hear about how their services will benefit your business. They don't mention how much time you'll save by hiring them, or how much extra money you'll make by outsourcing your projects.

Check out this **heavily** redacted version below:

I am web application Designer having 6+ years of experience in web development and designing. I have worked on various PHP/MYSQL, CMS like (WordPress, Joomla) along with creation of modules, plugins, and components. Also have good exposure to theme development and integrations. I can also implement Jquery / AJAX to improve the User Interface of the design. I have worked on the Facebook Apps, Facebook Connect, API Integrations with Twitter, FB, Google Maps, Amazon, EBay, etc.

Skills

- *Take broad, conceptual ideas and turn them into something useful and valuable*
- *PHP, MYSQL, CakePHP, Javascript Expert*
- *Worked on PHP, MySQL, Jquery ,Ajax, Dojo and Other Web Technologies.*
- *Good Exposure to Open Source products like Joomla,*
- *WordPress, Drupal, Magento, custom CMS, SugarCRM*
- *SEO knowledge and experience*
- *Good expertise on Photoshop, Illustrator, Flash and DreamWeaver (CS3)*
- *Excellent verbal and written communication skills*
- *Ability to think at a high level about product strategy and vision*

The unedited list was nearly 3 times as long...

So you might be thinking, "But I need to know all that, it's important." And while that’s kind of true, he's gone about it the wrong way.

1. He's made it all about him. **I couldn't care less about him. I care about me.**
2. He's written something that nobody will ever read. It's an epic email. In short, it's too long.

No One Cares About You

It might sound a little harsh, but tell me this: What do you care about most, your business or mine? I bet you didn't have to think for too long. It's a no-brainer!

So if people only care about their own problems, how do you write a proposal that sells *your* services?

Make the Proposal About Them, Not You

As I've said several times already, most clients don't care which tools you use. They don't care whether you're a Photoshop fanatic or a Sketch convert. They won't care whether you use PHP or Ruby and they don't care whether you write in Markdown or HTML as long as working with *you* will benefit *them*. **If your client can see no direct correlation between you and a better tomorrow, then say, "Adios."**

How do I talk about benefits? I have no idea of the ROI!

Benefits don't always have to be measured in 0's and 1's (although it does certainly help). Benefits can be directly or indirectly measurable. If you can't give a measurable benefit because you don't deal with data (imagine you're a UI designer and not an A/B tester) then you can talk about perceived benefits. You can talk about potential benefits. You can discuss your reasoning behind certain decisions, such as how a one-step opt-in will probably result in a higher number of trial signups than a two-step opt-in (this may or may not be true). It doesn't need to be a fixed ROI. Use your knowledge and expertise to demonstrate that you're an investment, not a cost.

An example of non-measurable benefits (i.e. results) could be something like the following:

Your client sells private pensions to retired military officers. He's seen that all the cool kids are using these new fangled hamburger menus on their desktop sites and he likes the look of them. He's even cited Uber as an example: "If they're doing it, it must be good. They'll have tested it, right?"

While you might not have any solid data to the contrary, you can use your knowledge and expertise as a designer to potentially save your client money *and* position yourself as the authority you are.

You know your client's audience is retired military staff. They're not typically the most up to date with the latest UI trends. So you quietly let your client know that while it's true these mobile-only interfaces are creeping onto desktop websites, it could actually create confusion for his customers. This in turn could cost him pageviews, increased bounce rates, lower newsletter signups, and ultimately, money.

Your knowledge as a creative professional can help your client in ways you may never have considered. It's part of the reason so many successful freelancers call themselves "consultants". The word alone conjures up images of a true professional. A consultant advises, and so do you! So use this knowledge to benefit your client.

It's natural to focus on the "I". After all, we're the most important thing in our lives, too. But step back and be mindful that you're selling to someone who's also interested in his or her "I".

Chapter 10: Design is Such a Small Part of Our Business

> *“Design is a funny word. Some people think design means how it looks. But of course, if you dig deeper, it's really how it works”. - Steve Jobs*

The more I learn about the business of design, the less importance I give to aesthetics. It’s true. Sometimes design serves as a mere distraction.

Don't hate me yet, designers!

While this chapter is written from a designer’s point of view, the lessons extend to all creative professionals.

There's so much more to a successful business than *just* good design. Design needs a reason to exist, a purpose. I'm not saying you should neglect your design skills, but I would suggest there are more important aspects to our profession. Designers (I speak especially to designers, as I am one) need to put business goals before pixels. **Results will trump a pretty design any and every day of the week.**

To be an effective designer you need to solve the right problems—and you need to know how to communicate the solutions.

Which would your client prefer, an app that made money, or an app that made it to the front page of Dribbble? Of course there's nothing to say you can't have both. But if you can hit the mark *and* meet your client's goals, everything else is a bonus.

What am I trying to say?

We all love beautiful design, but sometimes our design blinders can actually shut out the true purpose of a proposal: **to win the project.** Clarity is key, so stick with the basics. Clear content. Headings, subheadings, paragraphs and sections. Everything else is a potential distraction.

User Testing, Thanks to Amazon

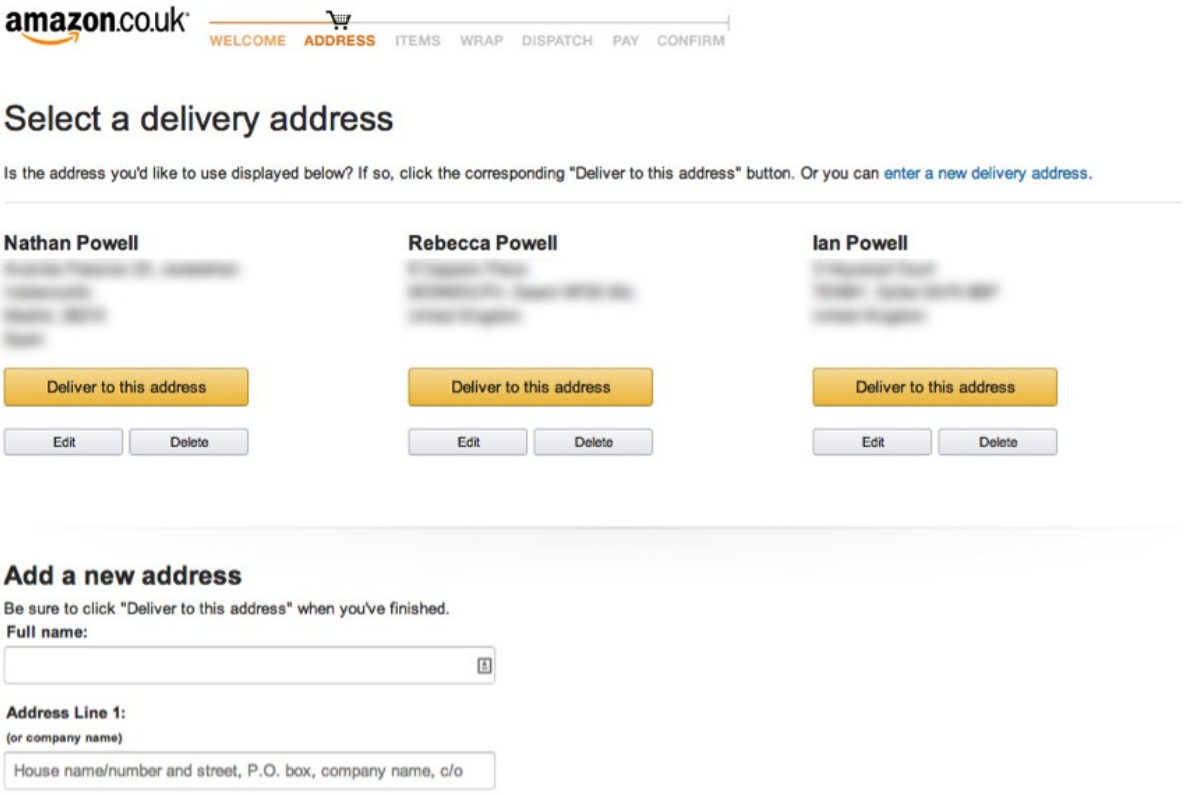
High converting checkout systems know the cost of distraction only too well. By removing anything that isn't 100% relevant to the end goal, online stores increase their chances of closing a sale.

If you're not sure what I mean, take a look at the examples below. You'll notice that Amazon removes all superfluous links from their checkout page. We’re left *only* with what's essential to close the deal. Notice the difference between the two screens…

I'm thinking about buying…



And now I've bought it...



Amazon is helping you to focus on the end goal: purchasing their product. In short, they remove all distractions. **Their goal is singular. Get you to buy.**

You can apply the same principle to your proposals.

Content should be presented in such a way that distractions are zero. Using crazy background images, funky layouts and insane fonts may seem cool, but ultimately it will only hinder your success. If you need to convince your client of your design prowess at this point in the game, then the ball has been dropped somewhere earlier. Don't forget they probably contacted you in the first place because of your previous work. Now's not the time to sell pixels.

Make it easy for your clients to *read* their proposal. They want to understand what you're saying, so let them.

The new wave/old wave message of content first has never been more relevant than for proposals. Keep it simple, keep it clear and forget about design *per se*. This is the *business* of creativity.

Interview with Mojca Mars: It’s All About the Client

How would you define a proposal and what part do proposals play in your business?

In my opinion, a proposal is a document that communicates the goals you want to help your prospect achieve and how you’ll help them do that.

When I first started, I sent out many proposals. Now I’m at a point where some clients still request a proposal, whereas others don’t because they are familiar with my work. They already know they want me to help with their social media management.

What did your first proposals look like, and has your approach changed over the years?

My first proposals were horrible. I had no clue what I was doing. I’d just been fired and had never had to deal with them before.

My first efforts were simple emails, not even a PDF. I tried to focus on the value I would bring, but as I didn’t have much experience, I was pretty terrible at it. After testing several different approaches, I developed a system—I would research every prospect and write their proposal based on the information I gathered and my knowledge of social media.

Focusing on the value was a game changer. After reading Brennan Dunn’s book, *Double Your Freelancing Rate*, my proposals definitely got much better.

Did you experience a moment when the lights came on and it suddenly all clicked? A eureka moment?

I don’t know if it was a single moment. It was rather a process of continuous improvement. I observed the results I achieved with trying different approaches and stuck with the things that converted a prospect to a client.

Getting the right information from a client can sometimes be a struggle. What’s your approach to client interviews?

At the beginning I had lots of local clients, so we’d usually get together over coffee and dig around for important information. After international clients came along, I naturally had to change this approach.

I now have a set of standard questions I ask pretty much all my potential clients and some specific and personalised ones I write based on my preliminary research. The prospect and myself usually jump on Skype for a 30-minute call and discuss details there.

After sending out a proposal, how much time do you let pass before reaching out?

It depends on the client I'm talking to and their business. I'll wait 7-14 days for some clients, but others need more. I usually go with my gut feeling and set reminders based on that.

Many creatives struggle with pricing. How do you deal with this in your proposals, and do you ever work with value based pricing?

I struggled with pricing when I was starting out, but after a few years in business these struggles have become less of an issue. I have a pricing system that works great for me. I work with value based pricing as well, but it all depends on the project/client.

Which do you think are the top reasons for a proposal being rejected?

In my experience, it has been price. For local companies thought they would get a professional social media strategy and management plan for half the price and see a 100% increase in revenue in less than a week. Which is delusional.

But I think the biggest reason for a proposal being rejected is when you fail to communicate the value you'll bring to your client's business.

Some creatives prefer to send out a one-page proposal, whereas others compile 30-50 pages replete with case studies, portfolio examples and testimonials. What are your thoughts on this and how do you approach the subject of proposal length?

I respect my clients' time. I don't send out 30-50 page proposals. I think you can communicate the value and benefits of collaboration in fewer pages.

When writing proposals, I don't limit myself to a specific number of pages. Instead, I want my proposals to be very goal-oriented, without any unnecessary fluff and easy to read.

Tell me how improving your proposals has changed your business.

Reading and exploring about how proposals actually work, what information you should put forward in order to make your offer more compelling definitely improved my business.

A proposal isn't just a bland document where you present your offer in a cold manner. It's much more than that. It's a presentation of yourself, your professionalism and the quality of your work. Every part of the proposal is important, from start to finish. Putting some extra work in it, figuring out what's the best way to present my business and what I have to offer was vital for growth, in my case. I recommend others to try the same - they might be surprised at the outcome.

If you could give one piece of advice to creatives who are new to proposals, what would it be?

The proposal is all about the client -- what can you do for them? What results will you bring to them?

And--read everything by Brennan Dunn. ;)

About Mojca

Mojca is the founder of Super Spicy Media and a social media consultant. Her clients love her because she takes away the stress of doing social media marketing and produces tangible results so they can focus on growing their business.

Chapter 11: Format, Style and Proposal Management

“The business of creativity is about more than being creative”. - Anonymous

Proposal Format

As creative types, we understand that presentation is paramount. While I spoke about the use of “design” before, presentation is the other side of the coin. How you present your work, your ideas and of course your proposals can make a huge difference. Imagine if Apple had decided to sell its iPhone in recycled shoe boxes, instead of their pristine white packaging.

So presentation matters. The question is, how should you present a proposal?

Let’s look at some of the options available and the pros and cons of each.

Old Faithful: The PDF

The PDF has been around for donkey’s years. Everyone including my mother can open them and see the same thing. While PDFs are universally accepted as the go-to presentation document, they do have some pros and cons.

Pros:

1. Your proposal will look almost exactly the same on any OS or device. This means you can really go to town on customising the design (See Chapter 10: Design Is Such a Small Part of Our Business).
2. PDFs are understood by even the least tech savvy of customers.
3. No special software is need to view a PDF, at least none that costs money.

Cons:

1. If large enough, they can be unwieldy. Your email account may struggle to send a large PDF as an attachment. Worse still, your client may struggle to download it.
2. PDFs are static documents. They won’t resize to fit a browser window, making reading uncomfortable on mobile devices.
3. If you need to update any content in your proposal, you’ll need update your original document, create another PDF and email it once again to your client.
4. Until your client sends verification of having received and read your proposal, you won’t know if it’s been opened.
5. PDF proposals have a far greater chance of being printed for offline viewing. If your PDF isn’t optimised for offline print, then you could have some “shrinkage” issues.
6. If you want to reuse sections from a previous proposal, you need to search through your proposal library, copy, paste and edit.

7. There is no way to accept a PDF proposal other than printing off a copy, signing it, scanning the signed copy and emailing it back again… unless you introduce a third-party digital signing service.

The Workhorse: Word

I feel like I'm betraying everything I believe in just for mentioning Word, but with such a huge place in the business world, I'd be silly not to.

Pros:

1. Universally used and understood (even if no one *really* knows how to use it)

Cons:

1. Can be edited by anyone
2. Again, depending on the content, the files can be huge
2. Has little room to manoeuvre when it comes to styling
3. Ugly as sin
4. If you need to update any content in your proposal, you'll have to edit the original document and email it once again to your client.
5. Until your client sends you verification of having received and read your Word proposal, you won't know if it's been opened.
6. There's no way of accepting a Word proposal other than printing off a copy, signing it, scanning the signed copy and emailing it back again… unless of course you introduce a third-party digital signing service.
7. If you want to reuse sections from a previous proposal you need to search through your proposal library, copy, paste and edit.
8. It's Word.

Online proposal services

Online proposals have been around for a while, but many creatives aren't even aware they exist. Maybe you've tried a few yourself but weren't able to find one that met your needs. I was one of those people and this played a large part in pushing me to build Nusii.

For this example, I'll talk about the pros and cons of Nusii, as not all online proposal services offer the same functionality.

Pros:

1. Can be viewed in any browser and on any device without having to "pinch and zoom". Proposals are responsive.
2. File sizes are easy to manage as there are no files. You send a link to your client as a URL.
2. You can email a URL to the proposal and be notified as soon as your client has opened it.

3. Updates can be made on the fly and will be immediately reflected in the proposal.
4. Your client can accept the proposal right in the browser without the need to print, scan or use any third-party digital signing services.
5. The PDF version of a proposal is already prepared for printing, so you know it will look great both on and offline.
6. Clients can share the URL with co-workers and other decision makers.
7. Online proposals are quicker to write as all your best content is stored in an accessible library of handy reusable sections.
8. Your data is always available in the cloud, meaning even if you don't have your own computer, you can sign in and get a proposal out to a client.

Cons:

1. Fewer options available to style your proposal as you might in InDesign.
2. Not all clients are comfortable with online signing.
3. Your proposals are stored online. If you are without Internet, you have no access to your proposals. (Although you can download a PDF version to view offline).

There are pros and cons to any system, but ultimately it's up to you to measure them and see if the advantages outweigh the disadvantages. Other considerations you might want to look at are cost and the time needed to learn new software.

Ideally, you want to give your client access to their proposal wherever they are. Reduce the friction. Find a format that meets your clients' comfort level or preferences.

Style

Style is a tricky one. If you work in the creative industries, then it's something you care deeply about. While I've already spoken several times about design, there are certainly aspects of your proposal where you *will* want to reflect your personality and branding.

Branding is very powerful, of course. It lets your client know who you are and hopefully makes your work instantly recognisable. But don't forget that style can be achieved through other areas too. After all, we're not all designers. Writing and content can be far more powerful than a pretty logo.

In fact, the way you write and the voice you use can have a huge influence on how a client perceives you. This is why recording client calls is such a great habit to get into. It helps form the voice you use in your proposal. It helps you to add something of *their* own style to the proposal, making it seem somehow familiar.

However you choose to style your proposals, make sure that your content is the star. It's your content that will win or lose a contract, not the fancy background or the watermarked logo in the corner. If by the time you send a proposal you still feel the need to convince a client of your creative prowess, your proposal may well be premature.

Let your client be sold on what you're actually proposing.

Proposal Management

If you've ever had to write and send more than one proposal at a time, then you'll know some kind of management system is a must.

Keeping track of templates, content libraries, proposals sent, proposals read, updated, accepted, rejected and pending (take a breath) can be a logistical headache. Add to the fact that you need to be working on billable projects, and you can see that *some* kind of system is fundamental.

In the "olden" days my system consisted of a proposal within each prospective client's project folder. I'd duplicate a previous InDesign template and copy it over to the appropriate folder (hoping I'd copied over all the associated images as well).

From there I'd use the content from the copied file as my boilerplate copy. If needed, I'd search through my computer for sections I'd used in previous proposals, some of which were in older versions of InDesign (if you use InDesign, you know they're not forward compatible) and paste them in. I'd continue writing, go search, copy/paste, then wash, rinse and repeat.

From all this came a single PDF that was then attached to an email, that was finally sent off to my client. All the while praying to the proposal gods that they would open it and say yes!

It was a messy system, especially when you factor in updates to proposals, tracking the state of a proposal and getting back an accepted proposal.

Obviously I'm biased when it comes to online proposals, but, **if you prefer to work old school, make sure you have a kick-ass system in place**. You can waste countless hours searching for content, designing templates, creating PDF's, emailing clients, touching base to see if they've opened the proposal, making updates and running every other aspect of your creative business. So make sure your process is as streamlined as it can possibly be.

Here is some other hard-won wisdom:

- Keep your reusable content organised and in one place, if you can sync this to a service like Dropbox, all the better. This way you can access it from anywhere.
- Make sure your basic templates are also stored in a central "filing system" so you can grab elements as you need them.
- Keep on top of your version control by numbering or lettering any updates made to a "live" proposal.

In short, be organised. Saving time here can save your sanity and get you back to "real work" before you know it.

Chapter 12: Content: Unique vs. Reusable

> *“Good artists copy. Great artists steal”.* - Pablo Picasso.

When it comes to proposals, there’s no doubt that the content should be tailored to your client, none whatsoever. The idea of simply swapping out the company name from a previous proposal just won’t wash. **You won’t win consistent business this way.**

The only way I could even begin to understand when this might work is for businesses who provide closed packages for *every single* client. But be careful, while you may only provide canned solutions, the problems are always unique.

I spoke to one creative agency who approached their proposals this way, and not surprisingly, their acceptance rate was around the 18% mark. You may as well write your proposals blindfolded. In fact, you might get better results that way.

Content needs to be crafted to the unique problems your client is facing, as should the solutions. It’s very rare to have a one-size-fits-all solution.

How much time do you currently spend writing proposals? Two hours? Four? A day-and-a-half?

It’s an awful lot of time to invest in something that *isn’t* a sure thing (client assessment interviews will certainly help with this). Especially when no money has changed hands.

One way to reduce the time you invest in each proposal is to work from, and I dread to use the word, **templates**.

Let me be very clear. I’m not talking cookie cutter stuff, I’m talking top quality content that can be used as a *starting point*.

Reusable content can be far more powerful than you might think. Let me give an example:

In all my proposals I include an Introduction. In this introduction, I say hello and remind my potential customer just who I am and what I do. Generally I use the same intro across all of my proposals, so it doesn’t need rewriting. At best, a little tweak will suffice.

This is the perfect candidate for a reusable section, and so it is. My Introduction is one of the many reusable sections I have in my Nusii account.

If there’s any content you are likely to use more than once, save it as a reusable section. If you’re not using an online solution like Nusii, then make sure your reusable content is well organised. There’s no bigger pain than having to trawl through old InDesign or Word files just to find that the section you were looking for was deleted, edited or simply lost.

Create a folder with the sole purpose of storing proposal template sections. Order them as efficiently as you can--by proposal type, by industry type, by section type--whatever gets the job done.

The time you can save with reusable content is staggering. We have customers at Nusii that save over 4 hours per proposal! This is because they’re not reinventing the wheel every time they start a new project. If you charge $80 per hour, you’ve already saved $320 dollars on your next proposal.

Be smart with your time, and don’t be fooled into thinking that templates mean “amataeur”.

Chapter 13: How to Structure Your Proposal

“Structure doesn't make a story formulaic. The writer does”. — Peter Arpesella

Depending on who you talk to, you’ll hear a multitude of format and structure musts. But ultimately it depends on the client you’re proposing to and your relationship with them.

Structure

If you’re you’re writing a proposal for a client who you’ve already worked with, then the format may well be different to that of a new client. Why?

Past clients know you. They know who you are, what you do and they already trust you. This doesn’t mean you can rest on your laurels, but it does mean your structure can be a little more relaxed. So let’s take a look at giving some structure to your proposals.

Below you’ll find a list of general sections or areas that can be included in a proposal. Not all sections need to be separated out like this, but it’s a good idea to have a solid understanding of what part each section plays.

The Proposal Cover

The proposal cover might seem like the fluff, but a cover that grabs the reader’s attention has already done a good job. Think of all those Kindle books you browsed through before finding *The Creative Professional’s Guide to Proposals*. Often it’s the cover (or title) that actually grabs your attention and convinces you that what lies beneath is worth reading.

Here are a few key elements to focus on in your cover.

The Title

Let’s use Amazon as an example. Say you’re looking for a book to help you write better proposals (you’re in luck!). You type “Proposals” into the search area and in the blink of an eye you have dozens of possibilities before you.

You might find:

- *Proposal Essentials-Win more, win more easily*
- *How to Write Reports and Proposals*
- *Proposal Planning & Writing*
- *The Creative Professional’s Guide to Better Proposals*

Depending on exactly what your problem is, some titles will appeal to you more than others.

Why?

Because certain titles will be more relevant to you and may answer a specific question you've already asked (if only in your own head).

The title of this book *The Creative Professional's Guide to Better Proposals* more than likely jumped out at you because you work in the creative industries. You hoped that it would be more relevant than some of the other titles (as do I).

Your client will also be looking for this (albeit subconsciously) in your proposal title. Take a look at the two proposal titles below, which do you think speaks more to the client and their needs or expectations?

1. Website redesign proposal for Panda Social Inc.
2. How to increase trial signups at Panda Social Inc.

Number 2 gives a clear indication about what the client will find inside. You've already made your "proposal" before they even turn the page.

Number 1 is stating the obvious and little else; Yes it's a redesign, and yes, it's a proposal. Both of those were a given. Use the title to intrigue your client, give them a glimpse of what you'll be proposing.

Your Contact Details

Having your contact details on the cover page is a good idea for one simple and yet not-so-obvious reason. Regardless whether you use an online service or a more manual approach, some customers still like to print out their proposals and read them while they are away from the computer.

If they have several proposals to read through and yours lacks any kind of contact information, you're adding work to the client's selection process.

It doesn't hurt to include your details throughout the proposal.

Your Branding

Again, one thing that will immediately stand out in a pile of proposals is your branding. As creatives we value consistency, as do our clients, so be sure to keep your proposal style consistent with your business branding. You don't need to go crazy here-- your business details, logo and business colours will do the trick.

Remember, if you need to convince your client of your design prowess at this point, then it's too little, too late.

The Introduction

Not everyone agrees with the need for an introduction in their proposals. Some argue that if they've spent time with your client that it's unnecessary. I completely understand this point of view, but I always include an introduction and here's why.

We all like to think we're special and we all like to think that we're the only horse in the race, but sometimes this simply isn't the case. There may be several businesses competing for the client's project.

While you should always aim to work directly with any decision makers, this doesn't mean that partners and colleagues won't read the proposal. A quick introduction to your company can help establish your authority. This will also gently remind your client who you are.

The Project Outline or Problem Statement

I tend to write the Project Outline and Goals as one section, as I find they naturally flow from one to the next, but I'll explain them separately here.

A project outline or problem statement can seem quite obvious as your client will usually give this to you directly. They might say something like:

> *Our website is five years old, slow, out-dated and our sales are rapidly declining. We need a redesign.*

The problem with just repeating this verbatim is that you're simply stating the client's problem as they see it. What they've actually given you is the end result of their problem.

What do I mean by that? Their website is five years old, and therefore is taking the blame for the decrease in sales. There are dozens of factors that could be contributing to this, and not just an outdated website.

By looking at their problem and going deeper into the reasons for the decline in sales, you can write a far more compelling project outline or problem statement. Of course, you need to do your homework here to move past their own version of the problem.

The Project Goals

As I mentioned above, Project Goals are a natural progression from the Problem Statement. Goals are set as a measuring stick. If the project has no goals other than a website redesign, you'll never know whether your work has benefitted the client's business or not. The outcome will be subjective to the tastes of the client.

> *No, I wasn't very happy with the redesign. I didn't like the new colour palette or the branding.*

There is nothing measurable there! We're not technicians or hired hands who push pixels, words or images, we're consultants who provide results. As such, we need Goals.

Let’s continue our example from above: So we’ve done our homework and after talking extensively to our client we can now list out some very specific goals. (Increasing sales just isn’t enough).

- Increase number of monthly visits by 35% in 6 months
- Increase time on site and engagement
- Increase the number of people entering our top funnel by 30% over period of 6 months
- Make website responsive and reduce website time load to less than 2 seconds

Specific goals give us a target to aim for. Our client knows exactly how we can help their business and it gives us a measuring stick for all future work. If we’d simply said:

- Redesign website
- Make it pretty
- Make it responsive

There would be nothing to measure. You’d be setting yourself up for failure and your client for disappointment when they failed to see the results they had hoped for.

Be as specific as the project will allow you to be. If you can’t add numbers or percentages, you can still be clear on the improvements to the project: increase engagement, increase trial signups, time on page, number of tweets, etc. Whatever it is, get it down in black and white.

The Solution(s)

This is where you let your client know that you’ve really understood their pain.

As you’ve probably gathered by now, when a client comes to you with a problem like, “Our website is five years old and our sales are rapidly declining. We need a redesign,” they aren’t telling you what the problem really is, they’re telling you how *they* see the problem.

The problem may be rooted in other things. There may well be other issues that need to be diagnosed before you can get to “their problem”. If you can nail that, you’ll have a great proposal.

It goes without saying that the Solution area of any proposal is where you spell out just how your expertise can address and improve upon their current situation. Don’t forget that a proposal is ultimately a promise of a better tomorrow. If a client doesn’t get a sense of that in your proposal, then it’s all for nought.

Pricing

Pricing is another area that I actually mix in with my Solution section, I don’t write a separate pricing section. Why? Because my solutions are closely intertwined with my pricing. I give

my clients tiered pricing options, but I won't go into that now, as we'll focus more on pricing later. Just know that it's an obvious and important area of your proposal.

Next Steps

Many people leave this last section to chance, writing something along the lines of;

> *Thank you very much for your consideration. We hope to work with you in the future.*
>
> *Regards,*
> *Someone*

If this is your approach, then you're leaving an opportunity on the table. A next steps section should be just that. Let your client know exactly what they need to do if they want to work with you.

- Do they need to pay a deposit to secure your services? **Tell them.**
- Do they need to hit the big green "Accept Proposal" button to get the ball rolling? **Tell them.**
- Do you need them to print a copy of the proposal, sign it, scan it and then fax it back to you in 1999? I hope not! But if that's the case, **Tell them!**
- Do you have limited availability? **Tell them.**

Make it as easy as possible for your client to take action after being blown away by your proposal. Don't leave them wondering, "What now?"

Of course, this is by no means an exhaustive list. You may also want to include a couple of choice testimonials from past clients who have also experienced positive results after working with you.

If you're working in a visual area of creativity, then including image samples can sometimes be beneficial. Add anything you feel is necessary to convince your client that you're the right person for the job. Just make sure these "extras" all push in the same direction as your proposal and are not merely eye candy. Everything in your proposal should have a purpose. If it doesn't, take it out.

Interview with Marcus Blankenship: Did I Mention That It’s About the Relationship?

How would you define a proposal and what part do proposals play in your business?

A proposal is a document that you write to communicate your approach to solving a problem, and provide choices about time/quality/scope of how that problem is solved. It is almost never read as deeply as the author hopes, and often times raises more questions than it answers.

Unfortunately, this is the way most of us feel that “grown-ups” operate in the business world. I think we must have gotten this impression when we watched our parents work, or when we watched movies with business people in them.

I hate them. I hate that my finances depends upon them. I hate that my clients don’t read them. I REALLY hate that they often don’t even reply to them, which is why I have to resort to other means to close deals. But more on that later…

What did your first proposals look like, and has your approach changed over the years?

I distinctly recall that I worked at a large company, and had started my company “on the side”, when a vendor’s proposal for a marketing website came across my desk. I copied it into a Word document, changed the name and logo, and started using it.

With time, I created my own proposals, using the client’s own language (from emails/discussion) as often as possible, and ALWAYS walked clients through with a “presentation call” so I could hear/see their face when I present it. I use it as a relationship-building tool, not as something to simply email and “pray”.

Did you experience a moment when the lights came on and it suddenly all clicked? A eureka moment?

I noticed that when I walked people through the proposal, and answered questions, I often closed on that call. Even if we didn’t get through the proposal, and we talked about new ideas, the relationships solidified before my eyes, and I won the business.

Getting the right information from a client can sometimes be a struggle. What’s your approach to client interviews?

I like them, and make the first call all about THEM. I certainly offer to answer questions about myself, and what I've done, but it's got to be about THEM above all. Their goals, their fears, their budget, their constraints, their bad experiences with other professionals, their pains.

Not all clients want to answer all your questions, especially about budget. Ease into the questions, but keep asking, and help them to know WHY you're asking. For example, when I ask about budget I say, "We can usually fit some kind of solution into any budget. What I need to know is are you looking to buy a Kia or a Mercedes?"

I also work hard to "qualify" the client to work with me. For example, I know in advance the minimum budget I will accept, and I have my "client qualification checklist" at hand, and am filling it out while talking with them.

After sending out a proposal, how much time do you let pass before reaching out?

Ugh, I hate that feeling of waiting. This is why I only send proposals 5 minutes before a "proposal presentation", and afterward I ask them, "What date can I expect to hear back?" When that date passes, I reach out.

Many creatives struggle with pricing. How do you deal with this in your proposals, and do you ever work with value-based pricing?

Yeah, I've done it all. Fixed bid, hourly, weekly, monthly and value-based. I try and fit the pricing model to the client, the work, and my efforts. I don't think there's a "wrong way" to do it, honestly.

Which do you think are the top reasons for a proposal being rejected?

1. No relationship
2. Client makes assumptions about the proposal, and rejects for the wrong reasons
3. Client doesn't want to play email tag, and is too busy to write out all their questions
4. Client doesn't read the proposal, just looks at the price
5. Client is shopping around, comparing prices
6. Client doesn't understand the proposal, but doesn't want to appear stupid by asking questions
7. No relationship (did I mention that?)

Some creatives prefer to send out a one-page proposal, whereas others compile 30-50 pages replete with case studies, portfolio examples and testimonials. What are your thoughts on this and how do you approach the subject of proposal length?

The more you have to write, the less of a relationship you have. Invest in the relationship, and send simple proposals. The proposal is NOT the time to convince them, it's the time to get them to say "yes" to what you've already convinced them of, which is to work with you.

Tell me how improving your proposals has changed your business.

Improving Creo's proposal was a key factor in our success, and not just because we won more business. Better proposals made us look "more professional", and thus compete with larger companies. It allowed us to appear "more serious" about our business, and demand higher prices because we sold the VALUE of the OUTCOMES, not just the activities. It allowed us to partner with larger companies publicly, and pitch work together with them, as they trusted we would not make them look bad. And in the end, the proposal is a direct reflection of YOU, and how you feel about yourself. In the same way that buying a nice suit makes you feel, act and think more professionally, putting the time in to create a great proposal makes you feel you've done your best, and put your best foot forward. You may not always win the work, but you'll never be ashamed of how you looked trying.

If you could give one piece of advice to creatives who are new to proposals, what would it be?

If you are a "visual thinker", you might expect that the visual layout, colors, images, fonts and icons used in the proposal are key to winning it. You would be wrong. I'm not saying those things aren't valuable, but in my experience they are never the deciding factor for your client. The words are king here, and everything else must take a back seat to them, as the job of the proposal is to communicate approach, benefits, time and cost. These are, in my experience, the winning elements of the proposal.

And, since we're on the subject of words… use fewer of them. Write shorter proposals, strive for clarity and ease of reading. Don't imagine that longer proposals make you look more impressive, more professional, or more creative. They are just harder to read, and often more confusing. Edit your proposals ruthlessly, and ask friends, colleagues or spouses to read them through before you send them. If your proposal hasn't been carefully read 10 times, don't even think about sending it.

Finally, the proposal will never sell itself. That's your job. Use it as an excuse for a conversation, to strengthen the relationship with the potential client. Get them on the phone, for a "proposal walkthrough" session, to ensure you answer their questions and (if possible)

see the look on their face when they read it. Use it to win work, but don’t expect it to win the work for you.

About Marcus

Nearly 20 years ago Marcus made the leap from senior-level hacker to full-on tech lead. Practically overnight he went from writing code to being in charge of actual human beings.

He's an Agency Owner and Management coach, and the author of the upcoming "Busy and Broke: The Agency Owners Survival Guide”. You can find him writing at http://marcusblankenship.com/become-a-great-manager/

Chapter 14: Pricing: Whoop! There it is!

> *“Price is what you pay. Value is what you get”. - Warren Buffett*

Sending out a proposal is scary. You imagine all those experienced consultants sending out exquisite proposals, written on hand-rolled gold and delivered by carrier pigeon.

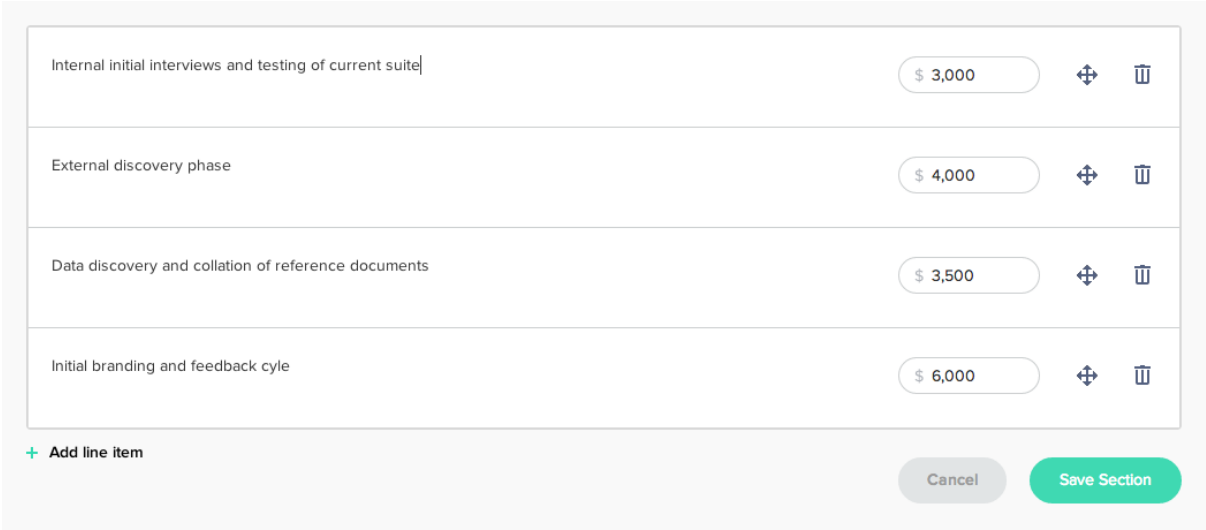
You know it's all in your head, but doubt creeps in and you begin to second-guess yourself. All of a sudden the Grand Total that only five minutes ago seemed so reasonable, now seems *outrageously* expensive. No one will ever pay that!

So you lower your rates. After all, you don't want to lose out to another consultant do you?

But what if you were only competing against yourself? Would that take the pressure off a little?

Don’t Lose Projects to “Chinese Menu” Pricing

If you've worked in the industry for a while, then you've no doubt seen a traditional invoice. They’re chock full of line items and standard pricing costs. Something similar to the image below:



The problem with pricing like this is that *everything becomes a cost*. Nobody likes to spend more money than they have to, and when you use the Chinese Menu method (a bit of this, a bit of that) it becomes too easy for your client to think exactly that:

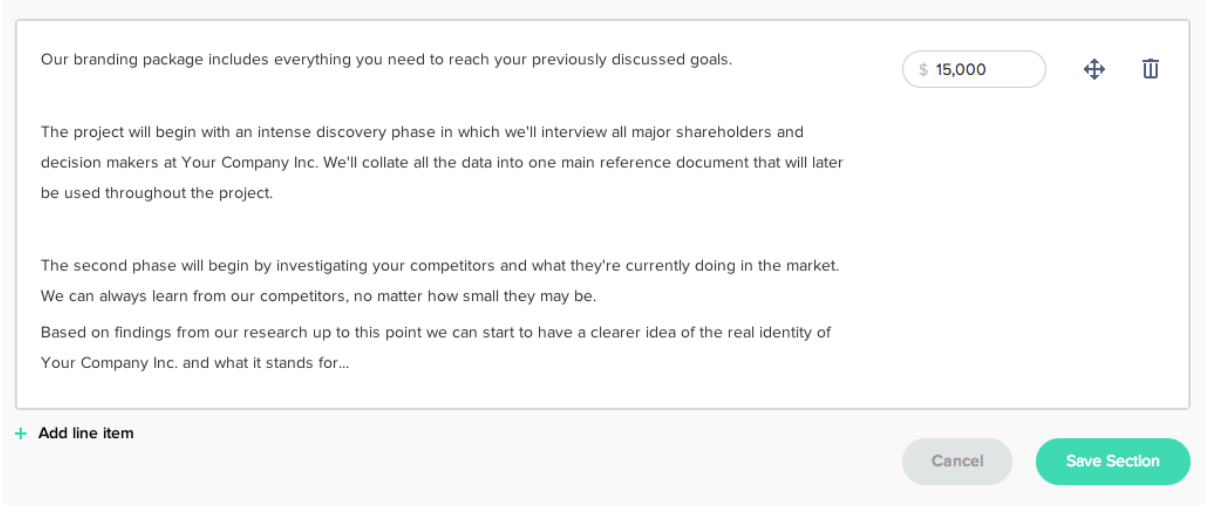
"I'll have a little bit of this, a little bit of that. I'll cut out this; I can't afford that…".

Not good!

With the Chinese Menu method, it's too easy for clients to focus on cost. You're *asking* them to pick your pricing apart because there's no perceived value attached.

Price Bundling Is Good, Right?

Hmmm... perhaps, but it's not quite that simple. To counter the Chinese Menu method, you *can* bundle everything together as one price package. If we take the above example and repackage it into a single bundle, then the customer is less likely to start picking it apart and more likely to see some value. See below:



Of course there is a downside to this method as well. **By creating one large package, you're actually giving your client an ultimatum.** Work with me for $X, or don't. There's no room to manoeuvre. There's no choice. As an aside, I would encourage you to talk to your customer’s needs and how you'll actually improve their business. Don’t just list out everything you can do for them.

A Better Way to Provide Value: Tiered Pricing

Check out the example below from one of Nathan Barry's product pages.



THE BOOK

The budget option (but still great!)

You know, I want to make sure the book doesn't get undervalued. It really is where I spent the most time and effort. The tutorials and interviews are very useful, but let's not overlook the book itself. You will be referring back to the best practices in this book for years to come.

So, if a budget is an issue, I highly recommend getting the book by itself. You won't regret it.

$39
BUY IT

THE BOOK + VIDEOS

If you want a smaller package, we've got the book and some of the videos and resources for you.

$99
BUY IT



THE COMPLETE PACKAGE

Everything you need to design beautiful iOS apps.

$249
BUY IT



You'll notice how Nathan bundles all of his Chinese Menu items into *several* value packed bundles. Smart.

If you visit the full sales page and read through his copy, you'll see that spending more isn't so much seen as an added cost, but as an investment in your education and career. You're not paying an additional $60 to get the video interviews and tutorials. You're investing $60 to shortcut your learning curve, and make more money *sooner* by learning from the best in the field.

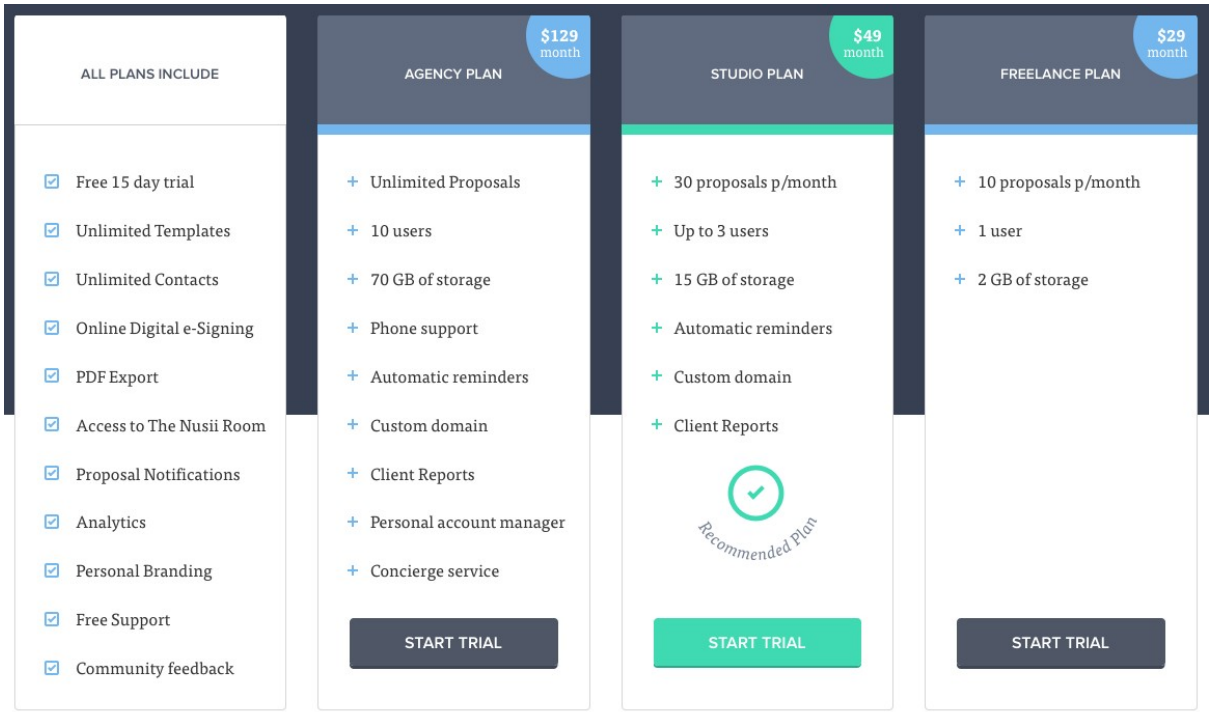
The value is evident, making the cost secondary.

And what's more, if you can't afford the "complete" package (which you didn't know you needed) you can opt for one that falls more in line with your budget. You're already sold; it's just a case of choosing an option. A lovely win/win situation.

Now, I know that some people don't feel comfortable offering up-sells. And looking at the way some businesses do it (mentioning no names, GoDaddy), I'm not surprised. It can feel a bit dirty, but it doesn't have to.

Sometimes your client just doesn't realise that by adding a certain element to "Package B" they can have 10 times more value brought to their project. This is why it's important to get as much face time as possible with your clients using client interviews *before* writing a proposal.

As a quick exercise, check out a few SaaS pricing pages. What do you see? The higher the price, the more value they provide. And there are options!



When you *anchor* one bundle or tier against another, you significantly increase your chances of making a sale. If you're not using price anchoring or tiers in your proposals, then you

could be leaving a *lot* of money on the table. You could also be under-serving your clients. Try offering more value at a higher price point. You may well be pleasantly surprised.

Chapter 15: Value-Based Proposals

This is an awesome guest chapter by Philip Morgan and Jonathan Stark.

Value-based pricing is the final boss of proposals. Allow me to explain.

Value-based pricing is the practice of pricing work based solely on the value it provides to the client rather than based on the effort required, the amount of time spent creating results, or any other input. When done properly, it creates a powerful sense of partnership between client and consultant, and at the end of the project both walk away feeling like it was money, time, and effort well spent.

I call it the final boss of proposals because it's not just a different way of writing proposals or a different template. It's actually a different way of doing business.

Value pricing is an exciting topic that's often viewed as a fix for low earnings, or the thing to try if pricing by the hour stops scaling as a company grows. Value pricing *is* a great pricing model, but it's most definitely not a cure-all, and it will fail completely if you don't make some other process and behavioural changes in your sales process. In fact, those changes extend beyond sales to your entire business.

To successfully implement value pricing, you'll probably need to make changes to:

- How you position your business
- How you market your business
- How you handle sales conversations
- How you manage and deliver projects

I know, this list covers almost every aspect of your business! Please remember that value pricing is not a superficial veneer you apply to the same old way of doing things, so it’s not going to be a quick makeover.

Is It Worth It?

So if you have to make so many changes in order to implement value pricing, is it worth it?

I think it is worth it because successfully implementing value pricing means you have increased the maturity of your *entire business*. It means you have graduated from being a casual freelancer, consultant, studio, or agency to being a focused and intentional professional managing an expanding business.

Successfully using value pricing means:

- You have developed expertise that attracts clients, rather than taking any client with a pulse and a check book.
- You have marketed yourself in a way that demonstrates your expertise and promises clients that you can solve expensive problems or create significant improvements by working with you.
- You are able to share risk with your clients as a true partner, and you have moved beyond the limitations and frustrations of being a vendor or hired hand.
- You will be more fairly rewarded for your expertise, have greater choice over which clients you work with, and you will be able to completely bypass projects that are doomed from the start.

Let's dig into how a value-based proposal works!

Pricing

Late night variety show host Johnny Carson presided over the most simple and clear illustration of value pricing I've yet seen. His show once hosted a man who was known as the world's best salesman[1]

While the salesman was a guest on the show, Johnny said, "I understand you sold more than any other salesman this year at your firm. How about you sell me something."

The salesman said, "What would you want me to sell you?"

"I don't know, how about this ashtray?" Johnny answered.

"Why would I sell you that ashtray?" the salesman replied.

"Well, it is a useful thing to have around, a lot of our guests use it, and it also matches the desk." Johnny answered.

The salesman asked, "How much do you think that ashtray is worth?"

"I don't know, maybe $199?" Johnny replied.

"Tell you what. You can have it for $50."

All the important elements of value pricing are contained in that simple exchange.

Who sets the value? The buyer—who I'll refer to as the client—sets the value. Notice the seller—who I'll call the consultant—did not argue about the value and did not try to impose a value estimate on the ashtray. He only asked the client to establish the value and moved on from that starting point.

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1 Michael Gilliam, *Quora,* http://qr.ae/LVKKy (Jan 27, 2015)

Who set the price? Because this was a simple fixed-price transaction, we can say that both the client and the consultant set the price. The price was lower than the value, but the consultant started by naming a price and it was then up to the client to decide if that price was fair given the value of the ashtray[2].

Who did the selling? Both the client and the consultant did the selling, but notice how the roles were divided up. The consultant asked the right questions, and the client *sold himself on the benefits of the project in his own words with his own thought process*[3].

This is a very simplified example, but it shows the most important elements of value-based pricing very clearly. Every successful value-based proposal will be preceded by a sales conversation with these three key elements:

1. **The buyer will set the value**. You will ask the right questions at the right time to help your buyer explain the value, estimate the value, or discover what the value is. But you cannot impose a value on the project--only they can do that.
2. **The buyer will sell themselves on the benefits of the work**, again with you asking the kind of questions that help them see the benefits.
3. **You will assign a price that represents a good deal in light of the value**. They will decide if it's worth this price.

Most importantly, *all of this* will happen *before* you present a proposal.

Let me point out a few more important lessons from the ashtray story:

- You can't sell your prospective client something they don't want or don't value in some way. No number of advanced selling techniques will help you convince your client to pay $500 for an ashtray they value at $199.
- If your cost of delivering the results in question exceed the value to your client, then value pricing won't work for that project. Neither will hourly billing, for that matter. That's what I was talking about when I mentioned "projects that are doomed from the start" above. If the ashtray costs you $250 to make and the client values it at $199, you can't do business with that client. Maybe others will value your ashtray more, maybe you need to reduce your cost of delivery, or maybe you need to redesign your ashtray to increase its perceived value.

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2 In a project where your work is priced by the hour and billed in arrears, you might be surprised to learn that no one really sets the price. The price is the total of all of your invoices after the work is complete.If the actual price is less than or equal to what you estimated at the outset of the project, your client will probably be pleased. But don't confuse your estimate before the project is over with the price. They are unlikely to be the same on a project priced by the hour.
On a fixed fee project where you set a fee for the work at the beginning of the project and you don't change that fee with change requests, then the price of the project is whatever fee your client agreed to.

3 Again, this is a simplified example. In a real sales conversation, there are many ways to subtly influence the buyer's perception of things via techniques like anchoring. None of these advanced techniques change the bottom line truth that your buyer must be convinced of the benefits and the value of a project, and the best way for them to become convinced of these things is through their own natural thought process. It must make sense to them.

Courting Clients

One quick note before we dive into the nitty gritty details of value-based proposals.

Do not chase clients that you want to use value pricing with. If you chase them, you will project a sense of desperation. Worse, you will signal to your prospective client that you don't understand their business priorities.

Why? Unless they are truly bad managers of their own business, your clients will prioritize their time and money in ways that accurately reflect what *they* value. If your services help them with projects that they value, they will approach and—if necessary—chase you. If you chase them, they will begin to perceive you as a nuisance who doesn't really understand their business priorities.

How do you talk to prospective clients if you don't chase them? Your marketing needs to create opportunities for *them* to approach *you*. This is the subject of many other books, and I can't fully answer that question here. From experience, I can tell you that the following short list of marketing approaches work best to create a "client approaching consultant" dynamic:

1. Giving talks, speeches, or workshops at events attended by your potential buyers[4] on subjects where you have some expertise
2. Podcast guest appearances that your buyers listen to
3. Expert educational or analytical articles in publications that your buyers read

The Sales Conversation

One of the secrets of a successful value-based proposal is so simple, you won't believe it. Here it is:

Your proposal must contain zero or fewer surprises for your client.

If you're used to presenting proposals that contain new ideas or approaches you haven't discussed with your buyer, this may seem strange. Isn't the proposal supposed to impress or persuade your buyer?

Absolutely. Not.

Unless you are a world-class persuasive writer (and you're not--Hemingway couldn't do this), you **do not** want to depend on your proposal to convince your buyer of *anything*. Your physical presence or your voice is sure to be *much more persuasive* than your writing will be. Your proposal should be a *summary*, not a pitch.

For this reason, your sales conversation should include a lot of questions. You need to explore your prospective client's need or problem in a way that sets you up properly for a

4 Your buyers are the people who have the power and budget to initiate and approve projects that involve you. Carefully consider who attends events where you are marketing yourself and make sure your buyers are there, not just your peers.

value-priced project. You need to find out what the "ashtray" is and what it is worth to your client.

Doing this with live clients is a learning curve, and the first several times you try it, you will probably be inclined to skip over some critical stuff in your eagerness to submit a value-priced proposal.

Diagnose Before You Prescribe

When you're interviewing a potential client, always remember this: *diagnose before you prescribe*. A doctor who rushes through or entirely skips the questions and tests needed to correctly prescribe medications or procedures would be liable for malpractice.

Rarely will clients come to you with a correct diagnosis of their need or problem, let alone the correct prescription for making it better. It is incumbent on you to *guide* the diagnosis, and if necessary, help the client chill for a minute and participate fully in the diagnosis.

Here are some ideas for slowing down a client (or yourself) who is rushing through the diagnosis or wants a prescription without any diagnosis at all.

Talk your prospect out of hiring you

I know this might sound crazy, but try to talk your prospective client out of hiring you, or into finding a cheaper or better way to accomplish their goals. If you try to talk them out of hiring you:

- You will position yourself as a true partner instead of an opportunistic vendor who wants to make a quick buck. Your client will see that you are trying to help them, even if that doesn't involve hiring you.
- If the alternatives to hiring you are not good, you will strengthen your client's desire to hire you.
- You will begin to understand the *business or financial reasons* why your prospect is talking to you.
- You will learn what pain they are suffering, what pains are present but don't really matter to them, and their perception of how to solve the pain.

In greatly simplified fashion, here's what that could look like:

Client: Cigarette ashes are getting everywhere on my desk and making a real mess. I think we need an ashtray!
You: Why don't you just use a paper cup instead of an astray? Ashtrays can be very expensive, you know.
Client: This is a national TV show! We can't be seen using a paper cup, which would make us look like unsuccessful schmucks.

Or, a more contemporary example might look like this:

Client: We want a custom e-commerce store built from scratch.
You: Why not build something with WordPress and WooCommerce, or Shopify?
Client: We've explored that, but we require functionality that those products don't provide.

Or:

Client: We want a new design for our site.
You: Why not buy a theme from Themeforest? That'd surely be more cost effective.
Client: We presented that to the company owner, and she said that would cheapen our brand. It's really important that our personality come out in this design.

Find out what success looks like

Another critical aspect of exploring the value a project might hold for a client is to understand what success looks like. This may be a lengthy conversation, but it usually begins with a simple question:

What would it look like if we really hit a home run on this project?

The answers to this question will lead you in the right direction. They will uncover the business, financial—and yes, the emotional reasons—why your prospective client is talking to you. Specifically, you may hear answers like these:

- If we don't increase sales with this new site, I'll have to lay off line workers.
- Our primary competitor introduced this feature last year, and we're rapidly falling behind.
- Success with this project is an important part of my career development. A home run on this means a promotion for me.
- My boss is furious that this project is delayed, and my job is on the line if we can't fix that.

Keep in mind that employees will usually have very different "home runs scenarios" than the owner of a business will. In a privately-owned business, the owner's motivations and risk tolerance for spending what is essentially their own money are naturally different from an employee's for spending what is at most a budget or P&L sheet they are responsible for.

The first answer you get in response to the home run question will probably not contain enough information. So keep asking more questions--keep going deeper. When you start to hear detailed answers about time or money, you probably have gotten the information you need to begin discussing an effective solution.

In addition to understanding the business, financial, and emotional reasons why a project is important, you must discover what exactly the project must accomplish. These are the project objectives, and they must be measurable.

I can already hear the designers among you protesting. "You can't measure art!" Or...

- Brand perception
- Ease of use
- How "cool" something looks

The thing is... **you can**. You can measure the result or outcome of every one of those things and more. You may not be used to measuring those things, but they can be measured. Not the way you would measure the earnings of a business unit or the diameter of a bolt, but they can be measured nevertheless[5]. If you can't measure the thing you are going to deliver, you'll never know if you succeeded!

So before you submit a proposal, get client agreement about why you are doing the work, what the results must be, and how you will measure those results. If your point of contact is having trouble answering questions about objectives, results, or measurement, there's a good chance you are talking to an underling, not the buyer who is responsible for the results of the work.

The Proposal Itself

At some point, it will be time to submit a proposal to your prospective client. How will you know when it's time? If you can write a proposal with zero or fewer surprises for the client, you can proceed to that step of the sales process. Check with your client too, to see if they'd like to see a proposal.

The proposal itself is a **summary** of the sales conversation that has proceeded. Again, it is *not* a pitch or a presentation of new, untested ideas.

I hear the more right-brained among you grumbling again.

How do we sell our vision for this project? How do we express our unique design or aesthetic sense?

These elements can be shown to your client either during the pre-sales conversation, or in a report following a paid discovery session. But they should not appear for the first time in your proposal.

The proposal itself should contain the following elements, in this order:

- Description of the problem, in clear, unvarnished language
- Objectives of the work
- Measures of success
- A description of the value to the organization
- Options for getting there, usually three
- Set time expectations: You will feel urgency about accomplishing project objectives
- Define joint accountabilities
- Terms and conditions of the work
  - Fees for the work
  - Payment terms
  - Discounts if applicable
- Signature block

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5 This is a great resource for learning to measure intangible things: http://www.howtomeasureanything.com/

While many of these elements are the same as in any proposal, a few of them need further explanation.

About Options

Most value-based proposals will contain three options, at three different prices. The options must provide different amounts of value.

In most cases, you will have discussed these options already with your prospective client. It's just natural to do so as part of a thorough sales conversation. But if your sales conversation uncovered enough information to put together only one option, then providing additional options that your prospect might be seeing for the first time in your proposal is not a red flag--just a yellow flag.

The lowest value and lowest price option will provide the minimum result your prospect needs. The two higher value options will keep piling on the value. Here are some examples to get you thinking:

Example 1

- Option 1: Develop a new RFP response template
- Option 2: Develop a new RFP response template based on best practices learned from interviews with 5 companies that have a high close rate on RFPs
- Option 3: Develop a new RFP response template based on best practices learned from interviews with 5 companies that have a high close rate on RFPs and act as a reviewer on your next 3 RFP responses

Example 2

- Option 1: Design UI/UX for new web site
- Option 2: Design UI/UX for new web site based on in-depth interviews with users
- Option 3: Design UI/UX for new web site based on in-depth interviews with users plus 1 design optimization cycle based on 3 months of usage data after the initial design is deployed

Example 3

- Option 1: Weekly strategy call with 1 employee
- Option 2: Weekly strategy call with up to 5 employees plus email access for questions
- Option 3: Weekly strategy call with up to 5 employees plus 24x7 email and phone access for questions

The primary distinction between options will be value and price, but a third common distinction is risk. Removing risk from your client is a way to increase value and charge more. Blair Enns has an excellent article on this subject if you're interested in learning more.

About Timing and Deadlines

Be very realistic about timing and deadlines in your proposals. This applies to *any* proposal, not just a value-based proposal.

On any kind of project, there are dozens if not hundreds of variables that you have no control over. Client responsiveness when feedback is needed, unexpected developments in the client's business, and illness on your side or the client's side are just three events that can delay the completion of a project.

If a project does require firm completion dates, call out your assumptions about what will be required to meet those dates.

About Accountabilities

You will almost never be the only party responsible for the outcome of a project. Your client will need to participate by providing information, feedback, and access to personnel. Use the proposal as a place to clearly identify who is responsible for what, and places where there are joint responsibilities.

Getting Approval

When you submit your proposal, be sure to indicate that if you have not heard back from your prospect by a certain calendar date, you will contact them to discuss the proposal. A month is almost certainly too long to wait, and a day is probably not enough time. I suggest 3 to 5 days for most cases.

For most situations, sending your proposal electronically via email or proposal software like Nusii is appropriate.

Conclusion

If you use the approach described in this chapter—especially treating the sales process as a careful discovery of your prospective client's true needs—then you will have a better close rate on your proposals. For the situations where you don't get an enthusiastic yes in response to a proposal, there is usually an opportunity to learn why your proposal didn't match their needs, revise the proposal, and try again.

Even if you choose not to adopt value pricing, I'm 100% confident that if you learn to ask the right questions during the sales process, your projects will begin to go much better. You'll run into fewer frustrating "crazy client" situations and begin to be known as a company or individual that your clients can rely on for outstanding results.

For a template you can use for your own value-based proposals, go to ‘Closing Notes’ where you’ll have the chance to snag a bunch of proposal goodies.

About Philip

Philip Morgan helps development shops get more qualified leads without hiring a sales person. He's also the author of The Positioning Manual for Technical Firms.

About Jonathan

Jonathan Stark is a mobile strategy consultant who helps consumer brands thrive in the post-PC era. Jonathan is the author of three books on mobile and web development, most notably O'Reilly's Building iPhone Apps with HTML, CSS, and JavaScript which is available in seven languages.

Chapter 16: Final Advice: Taking Care of Details

Before you send your proposal out to the client, your mind is usually buzzing with excitement —and panic—as you try to make sure you've covered all the major and minor pieces needed. Rather than flipping through all of the pages to see if you've caught everything, here's a quick review—plus a few standard practices I always use for my proposals:

- You need to understand your client's problem.
- You need to offer a solution that *shows* you understand their problem.
- You need to price your proposal in such a way that your client can see a clear ROI on their investment.
- And lastly, you need to show how their business will benefit from working with you.

That's the basic outline for any successful proposal. However, sometimes, and no matter how well you write your sales proposal, you'll have clients who are still on the fence. This doesn't mean they're bad clients, there can be any number of reasons for a delayed response.

So how do you encourage a client who is *umming* and *ahhing* to hit that big old "Accept" button?

Let's look at two quick tips that can help you win your next project and get money in your bank as quickly as possible!

Create a Sense of Urgency with Your Sales Proposal

Marketing 101 tells us that scarcity is a sure-fire way to make more sales. But how do you apply this to the world of proposals?

Respect your own deadlines. Remember all of the leads you're nurturing, the clients you're serving, and the demand for your services. *Obviously* you can't hang around forever for a client to accept, so don't be afraid to follow up..

Include an expiry date in the proposal.
An expiration date shifts the client's mindset from, "I'll make a decision when I can," to "I need to make a decision by X." A sense of urgency is created and your client is *encouraged* to make a choice.

I know what you're thinking, "What if they come back to me after the deadline and want to move forward. Won't I look like a doofus if I say OK?"

No. If you're still in a position to work with them after the deadline then you can renegotiate elements of the original proposal and start again. The world of consulting, design, development and helping businesses grow isn't a static one. Things quickly change, as do priorities. Re-examine the project and go from there. Are you still interested? Great! If not,

see how much pleasure it gives you to be able to say, “Sorry, my pipeline is full for the next 3 months.”

The other great thing about adding an expiry date to your proposals is that you'll have a far clearer idea of what your calendar looks like for the following months. If you know what your proposal acceptance rate is, then you can plan accordingly.

Give a Discount in Exchange for a 100% Upfront Payment

That's right, you read correctly. And I can hear you thinking, "What the hell are you saying, discount my services? Isn't that the ultimate sin??"

Let's see…

How do you usually charge clients?

- 50% deposit and the rest on completion?
- 25% deposit and then gradual milestones?
- A weekly rate of $XX.XX?

There are countless ways to charge your clients. The problem with the great majority of methods is that they keep you waiting.

What would it be worth to have the full project fee in the bank before the project even began? I'm guessing quite a bit.

You don't have to give away the house, but a small incentive can be a huge motivator. I've used this approach myself, so I know it works, and well.

Here's an example I used in one of my own client proposals. (The entire fee was in my bank in a matter of days.)

> *One final thing, I'd like to offer you a 5% discount for full and immediate payment of your chosen solution. Simply make your payment by the end of Wednesday 6th and enjoy either $X or $X off the total price.*
>
> *I'll send a payment link on confirmation of acceptance.*
>
> *If you have any questions, don’t hesitate to get in touch.*

Try it in your next proposal and see how your cash flow stabilizes.

Contracts and Agreements—Are They Part of a Proposal?

At Nusii, we offer support through a private customer community, the Nusii Room. This question has cropped up several times in that forum as people are completing their proposals, so I’m offering my advice here.

Should I use a separate document for my Terms & Conditions and contracts?

In the past, I've experimented with both options. I've included terms and conditions and even a simple contract in my proposals, all of which have been accepted at the same time.

I'm not a lawyer, nor am I aware of your specific situation, so please use your best judgement to seek professional legal advice. That said, I believe that making the process as easy as possible for your client gives them less to push back against.

Including these "extras" are nice for obvious reasons, because you kill two birds with one stone. You limit the back-and-forth, there are no separate documents and no other services need be involved.

It's fairly easy to feel safe with this approach if you're working on smaller projects where adding a short terms and conditions section is no big deal. But what happens when you start to play at the other end of the field?

Tradition dictates that a proposal should be accepted, then a contract should be signed with all the appropriate terms and conditions in place.

For the most part, as independent consultants, I don't think we have to worry too much about 20-page contracts. Our terms can usually be summed up in what we will provide, and when and how we'll do that. We can talk about payment expectations, milestones, who owns what and to what extent. Past that, what else needs to be said? In my experience, not much.

Back in 2008, Andy Clarke of Stuff and Nonsense published a legalese-free contract, available to anyone who might need it. It has since been updated several times and you can find a copy here.

This was the contract that I used to cut up and use at the end of my proposals. It's minimal, straightforward and uses plain language.

As I've said, I'm not a lawyer, so if you have to deal with areas that are particularly complicated, then do talk to a lawyer. Things need to be right, and you don't want to do yourself a disservice by signing away the rights to your latest masterpiece.

Interview with Marie Poulin: Great Proposals Are Your Ticket to the Big Leagues

How would you define a proposal, and what part do proposals play in your business?

A proposal is a loose presentation of what results a potential client could expect to achieve via our collaboration. I used to produce proposals a lot more often, but these days I send them less and less frequently as I reduce my client work for more product-based work. At this point, they act more as a formality, but generally speaking, I tend to outline the project as I understand it, the expectations (for each of us), the vision for the solution, and a loose outline of some of the strategic and tactical approaches I recommend.

What did your first proposals look like, and has your approach changed over the years?

My first proposals were very rough, of course, and in fact they were more like estimates with line items. This was fine at first because a lot of my work was word of mouth. Of course, after nearly a decade of proposal writing, my approach has evolved massively over the years. I used to hate putting proposals together, and now I really enjoy the process! I spend a lot more time with a client before assembling a proposal, so that alone has been one of the biggest changes in my approach. I no longer use a lot of legal jargon (I save that for a separate contract!); it's all in a language my client understands, and I no longer break out tasks into line items.

Did you experience a moment when the lights came on and it suddenly all clicked? A eureka moment?

After working in various studios and seeing how much more thorough their proposal process was, I started to realize that I was really missing out on an opportunity to sell the results of us working together, so now I take much more time to write them out properly.

Properly written and designed proposals are what move you from small potatoes into the big leagues with regards to budgets and scope. If your proposal is the first thing people experience of working with you, you better make sure it's not only memorable, but that it really sells itself! Fancy jargon and numbers doesn't cut it—you have to use your client's language, and write proposals from their point of view. So I'm not sure if there was a eureka moment exactly, but over time I started to see that my proposals were a way to really differentiate. If a client is getting estimates from three different designers, how can I make mine stand out? Working together needs to feel like an investment vs. an expense. So I

make sure they feel absolutely certain that I've got them, and they can trust me to handle the project.

Getting the right information from a client can sometimes be a struggle. What's your approach to client interviews?

I listen way more than I speak, and I keep things very casual and conversational; that's how I get the most honest answers. I'm willing to spend a few hours with a client up front before I put a proposal together, because there's no point in assembling a proposal when you don't have a full understanding of the scope. Also, since my projects tend to be pretty long-term, it's essential to me that we click on a personal level. It's better to invest that time upfront and make sure we're totally the right fit, than to find out later.

I've also done enough projects now that I see patterns, and can usually get a pretty good sense of where someone might be struggling, based on how they talk about what they need. I keep probing as much as I needed to make sure that I feel like I've got enough information to work with. I have no hesitations about following up with a client if I think I need more detail, and sometimes will send out a supplementary questionnaire. (It helps that I really enjoy talking to people about their businesses! You can learn so much from simple conversations if you're really listening.)

After sending out a proposal, how much time do you let pass before reaching out?

I would probably reach out if I hadn't heard anything within a week or so.

Many creatives struggle with pricing. How do you deal with this in your proposals, and do you ever work with value-based pricing?

Yes, I mostly work with value-based pricing. I typically break down projects into phases and results and assign a price to that phase. For example, I often recommend that newer businesses get their MVP (minimum viable product) up and running as part of phase 1. I then outline an estimate of phase 2, generally giving a price range over a defined cost. I've learned that with my strategy work, I tend to inflate the scope because I make suggestions that I know will make the project better, but tend to add more time. KNOWING this is how I work, I factor that into my budget. I've rarely ever heard a designer say "Wow, that took way less time than I thought, I made a ton of profit on that project!".

Most designers significantly underestimate their project budgets, and they plan for the absolute best case scenario. I think most designers should easily be adding at least 25% time/budget for unknowns and poor estimation!

Two other ways I deal with the money issue:

- I have "starting at" prices listed on my website, so people know what to expect already (again, the proposal becomes a formality).
- I ask people what their budgets are before we begin. Chances are if they've read my web copy, they know what range to expect, so the proposal is not a surprise!

Another thing that is super important for me personally is to view a proposal as an ESTIMATE of scope/budget. It is not a final contract. That's why I always give a range. I specify that a more specific budget/cost will be outlined after the discovery process. There is far too much pre-work to do to be able to lock in a fixed price after only a few meetings. I make sure they know that the range is flexible, and if they want to keep costs down, I'm very clear in our communication about what requests are modest, and which ones will add additional time/$ to the project. So far this looseness has not been an issue with my current clients. No one questions the value they get from working with me.

Which do you think are the top reasons for a proposal being rejected?

- The perceived value you bring to the project is not clearly communicated.
- The price feels out of alignment with the deliverables or results.
- The proposal feels boring, generic, and cookie cutter; you haven't shown them what their world could look like after working with you.

Some creatives prefer to send out a one-page proposal, whereas others compile 30-50 pages replete with case studies, portfolio examples and testimonials. What are your thoughts on this and how do you approach the subject of proposal length?

My proposals tend to be around the 10-page mark. Since most of the time the proposal for me is a formality, attaching portfolio examples, testimonials and case studies feels like overkill. At this point, they should have already seen those on my website–this is not the place to sell myself, but to sell my solution.

I think it always depends on the project and budget of course, but a 30-50 page proposal is complete overkill for a project with a budget of less than $25k. The amount of time it would take you to really nail that proposal is not worth the risk of not landing the job. I keep mine in the 8-12 page range; It's concise, easy to read, and beautifully designed. I have an overview/summary, process overview, then I get into more detail about each phase and what we'll accomplish, followed by general timelines and costs, terms, project management, and signatures.

Tell me how improving your proposals has changed your business.

Everything has changed. Knowing how to write better proposals was the key to really taking the service side of me business to new levels. Once I really understood the proposal as a positioning exercise, and realized how valuable it was to get inside my clients' heads, I was able to save time on the writing process and pitch projects at a much higher price point than I had previously ever imagined. This experience has also allowed me to teach this to my own students and mentees, and I've seen first-hand the changes that happen for people when they improve their proposal process. I've seen the changes, and they've seen the changes. It's a great confidence builder too; the feeling you get when you land a huge proposal reminds you that you're on the right track.

An excellent proposal is the difference between just scraping by, and doubling your revenue. It's a no-brainer to nail this as a skill if you are a service provider!

If you could give one piece of advice to creatives who are new to proposals, what would it be?

Your proposals are for your clients, not you. Make sure your client can really envision the success of your collaboration together. Make sure the value of what you plan to deliver is crystal clear. Also, learn to improve your copywriting, especially marketing copy. Your proposal is really a powerful marketing tool, and knowing how to write really effective copy will give you a huge edge!

About Marie

Marie Poulin is a digital strategist, designer and Founder of Digital Strategy School where she helps designers transition into more valuable and strategic work relationships with their clients. With a passion for online learning, she co-founded Oki Doki with her partner to help entrepreneurs plan, market, and launch amazing online courses and programs with more ease.

Chapter 17: What Happens After I Hit Send?

> *“Patience is not simply the ability to wait - it's how we behave while we're waiting”. - Joyce Meyer*

Once you’ve hit send, it can be a nail biting few days sat beside the telephone (or inbox). That sense of anxiety never completely goes away, but the more you perfect the stages leading up to a proposal, the better your chances of getting that acceptance notification.

But what happens specifically after you hit send depends on *how* you create your proposals. If you're old school, I’m afraid you're going to have to put in a little extra leg work.

Old school:

So you've written your proposal, created a PDF and emailed it to your client. Great! But as you don’t have any way of knowing whether they’ve viewed it or not, *be sure to check in within a day or two*. Bonus points if you can present the proposal in person or via Skype (that way you'll be able to take care of any questions or concerns on the spot).

Sometimes we mistakenly use language that goes over our clients’ heads (hopefully that is now a thing of the past). So if you're on hand when they read the proposal you can quickly smooth over any potential misunderstandings. It's hard to read facial expressions via email.

When you play it old school, presenting your proposal in person or via video is the only guarantee you have that they've opened and read your proposal.

If you *don't* have the option of walking your client through the proposal then you absolutely *must* follow up immediately. Check they've received the proposal. Check they've opened it (to the best of your abilities) and check whether they have any questions. As I said, if you're old schooling your proposals, you will need to put in a little extra work.

If you don't hear back from a client, follow up. Sometimes clients are busy, sometimes they forget and sometimes they're just plain slow. So give them a chance before giving into depression. If after a week or so and several emails you still haven't heard anything, I would suggest sending an email similar to the following (this comes courtesy of Blair Enns):

> *"I haven't heard back from you on [project/opportunity] so I'm going to assume you've gone in a different direction or your priorities have changed."*
>
> *Regards,*
> *Nathan*

This email is gold. A *large* percentage of no shows will contact you after sending this. If you still hear nothing, it's probably time to give up the goose and put it down to experience.

So what might this same scenario look like if you were using an automated system? I can only speak for Nusii, but here's how it would go…

New school:

After creating and sending a proposal in Nusii your client will receive an email with a link to view the proposal online (they can also download it as a PDF if they choose). As soon as the proposal is opened, you'll receive an instant email notification sent from Nusii. This lets you know that all systems are go, and that you should be ready to answer any questions. If you haven't heard anything within 24 hours, you'll receive an automatic reminder to follow up with your client.

One clear advantage of using an automated system is that you *know* when your client has opened their proposal—and how many times. This allows you to contact them at the right moment, if you think it's to your advantage, and field any questions they might have. If you have to update any areas of the proposal, you can simply edit the proposal and the client's proposal will automatically be updated without having to manage every change

Using an online proposal system means your client can accept and sign a proposal right in the browser. Forget about printing, signing, scanning, and emailing back and forth. Forget about using a third party digital signing service, Nusii will take of all that for you. Online proposals can speed up the entire process and increase your chances of hearing "yes".

Chapter 18: What to Do When a Client Rejects Your Proposal

> *“Sometimes by losing a battle you find a new way to win the war”. - Donald Trump*

When a client rejects your proposal, it can hurt both emotionally and financially. Unfortunately, rejection is part and parcel of running a business. Sometimes we blame the client, saying they weren't a good fit. But often it's not their fault at all. In fact, sometimes it's on us.

Whatever the case, a rejected proposal can feel like the end of the line. But it doesn't have to be, at least not quite.

So what’s the first thing you should do when a proposal is rejected?

Ask why.

You'd be amazed at how such a simple question can go such a long way. If a client has just rejected your proposal, why wouldn't you ask? You've done your homework (except in this case, not asking for a budget) and you've put in the time. Now's the moment to ask "*What gives?*"

You may be surprised by what you hear. We often worry that we’re too expensive, but sometimes the opposite is true.

In an interview with Marcus Blankenship (video available in our proposals bundle in Closing Notes), he tells us about a friend who worked in the aerospace industry. As you can imagine, they deal with *very* large contracts.

He went on to explain how they always throw out the cheapest bid. You know why? The answer almost beggars belief… because their budgets are huge, *they don't want to pay pennies*.

With perceived quality comes a price. When was the last time you saw a millionaire drive a Skoda?

Getting Feedback You Can Use

Asking why a project has been rejected won't magically get you the gig, but it will help you to learn what went wrong. Knowing *where* you failed will help you win that next project. Here are a few ways to get constructive proposal feedback:

High stakes user testing

Think of this “rejection interview” as a form of user testing instead. The information you gather on each "test" can help you make better decisions for the next. Unfortunately, the feedback cycle can take a while and you will need to lose a few proposals to gather your rejection data (an expensive test), but this does mean your long game can improve considerably.

Get feedback on your proposal before it gets rejected!

Getting feedback can be tricky when you work alone--just ask any freelance consultant. This is unfortunate as proposal writing is the perfect place for self-doubt to creep in.

This was a problem we definitely addressed at Nusii because I’m a solo consultant, too.

We built a private community for our customers where they could drop in at any time and ask for feedback on their proposals, ask questions about client work, and even give feedback on Nusii’s performance.

Having someone to turn to is crucial. If you can't find help in a private group like ours, build your own. Put out a call on Twitter and organise a feedback group, or better still, a mastermind. You won't regret it.

If it’s About the Money

Money isn’t everything, but is is a huge consideration for most businesses. Instead of living in fear of money conversations, step up, face them, and learn.

You came in too low

Believe it or not, you can lose work because you’re not charging enough. Here’s the typical scenario in these cases. The proposal bombed, you asked why, and the slap in the face is this: "You were too cheap."

How do you feel? Pretty crappy, I bet. But listen, we've all second-guessed our pricing. I have a feeling that the reason you came in too low was because you were scared to charge more. But remember, you're an asset, not an expense. So forget about competing with other creatives and start competing with yourself.

I repeat, if you can convince your client that you’ll be providing value, then you’ll be seen as an asset, not an expense.

You came in too high

Once again, this problem can be traced back to a lack of investigation about the budget in your initial client interviews. On the other hand, sometimes going over budget can be a good thing, providing you've given a suitable alternative that comes in under budget. As mentioned before, this is known as tiered pricing, and it’s something I highly recommend you try.

If you really have come in too high, and the client simply can't stretch further, then look at removing elements from the project *before* you consider dropping your price. A plumber would never drop his quote just because you don't have the cash.

Reduce the scope before your reduce your price. What you do has value and besides, there *will* be more clients. Don't forget, the issue of being overpriced is always remedied by knowing the client's budget beforehand.

Interview with Ilise Benun: There’s No Substitute for Knowing Your Client

How would you define a proposal and what part do proposals play in your business?

As a Marketing Mentor specializing in creative professionals, I advise on proposals, I review them and critique them. I sometimes even write them for designers or design firms. My definition of a proposal from that point of view is that it is quite simply a marketing document used to show what you know, describe what you propose to do for your prospect and, most importantly, make the strongest case possible for why you are the best candidate.

What did your first proposals look like and has your approach changed over the years?

Again, from the consulting vantage point, I would say most people’s first proposals are very simple, if they exist at all, and usually don’t include enough marketing information. It is used more as an agreement or an estimate than an actual proposal (per the definition above).

Yes, the approach has changed over the years, as it should. As you pursue better projects with bigger budgets, you have to make an even stronger argument for your services, especially because there are usually more people involved in the decision-making process.

Getting the right information from a client can sometimes be a struggle, so what’s your approach to client interviews?

I think it’s important to have a set of questions ready for the client to answer, either online or in a questionnaire or you can walk them through it to make sure you have all the information you need. In one of my Proposal Bundles, I do provide a pre-proposal question checklist that covers the basics. Of course you have to adapt it for your own purposes according to the kinds of projects you’re doing.

After sending a proposal, how much time do you let pass before reaching out?

I would always reach out immediately to confirm it was received. Too often, it gets caught by a spam filter and you wouldn’t know if you don’t confirm receipt. As an alternative, however, you’re much better off if you secure a meeting—by phone or Skype—in order to walk your prospect through your proposal. That gives you an opportunity to address any objections they have, answer any questions and, most importantly, close the deal. So don’t just send out a proposal; talk and walk them through it.

Many creatives struggle with pricing. How do you deal with this in your proposals and do you ever work with value based pricing?

Sometimes value-based pricing is the best option, but to do so, you have to spend a lot of time with the client, getting to know them and finding out where the value is in the project. Without that, you can't do value-based pricing.

Otherwise, the main pricing problem is determining a price before talking money with the prospect. In the first conversation, you ask all the other questions but leave out the money question. Then you have to guess at a price, which I often equate to playing the lottery: you cross your fingers and hope you pick the right number to get the job. To eliminate most of the pricing struggle, just ask the questions about budget. While the client may not know or won't immediately say, you have to push back. Ask the question in different ways. Put some numbers on the table so that they can respond to something concrete. That will usually solve the problem, frankly.

Which do you think are the top reasons for a proposal being rejected?

I don't think it's price. That's not usually the most important factor to the client. Good clients want the job done well. I think proposals are rejected because the creative has not spent enough time getting to know the client and as a result it isn't tailored to their needs. When you don't do that then it comes across as generic.

Some creatives prefer to send out a one-page proposal whereas others compile 30 to 50 pages complete with case studies, portfolio examples and testimonials. What are your thoughts on this and how do you approach the subject of proposal length?

In my Proposal Bundle, I have outlined four different proposal sizes: the one-pager, a small one at 2-3 pages, a medium one of up to 10 pages and a long one, at more than 10 pages. The length depends on many different factors, including how complex the project is. The more complex, the more pages it takes to make your argument because you do need to include such things as case studies, portfolio examples and testimonials.

Tell me how improving your proposals has changed your business.

I spend less time on the ones that I'm most unlikely to get and can therefore spend the time necessary to do a good job customizing the ones I am most likely to get.

If you could give one piece of advice to creatives who are new to proposals what would it be?

My advice is this: don’t misinterpret the question, ‘Will you send us a proposal?’ as, ‘They want me.’” You should make your decision based on specific criteria of how likely you are to get the job. So don’t just say ‘yes’. Go through a process to determine if ‘yes’ is the best answer. Sometimes ‘no’ is a better answer because then you use that time more productively pursuing your dream clients.

About Ilise

Ilise Benun is the founder of Marketing-Mentor.com, the go-to online resource for creative professionals who want better projects with bigger budgets. She is a business coach, national speaker, the author of 7 business books and the Program Partner for HOW Design Live's Creative Business and Design Entrepreneurship program. Follow her @MMToolbox and sign up for her free email newsletter, Quick Tips here: www.marketing-mentortips.com

Closing Notes

Writing compelling proposals is essential to running a successful creative business. I hope that after reading this book you've seen that it's not a dark art, but actually something that's within reach of every creative.

For me, there's one part of the proposal process that is key to failure or success. If nothing else from the book sticks with you, then I'd love it to be this:

99% of all proposals are written during your client meetings.

Without open and honest communication, you'll always be second-guessing yourself, and unsure about the results. So talk to your clients, involve them, ask *lots* of questions and **let them do the talking**. You'll be amazed what active listening can do for your proposal writing skills.

I really do hope that this book has been useful. And I hope that you'll feel more confident the next time a lead hits your inbox.

A word of warning

One last thing, because I don't want you to learn this the hard way…

Proposals are only part of the game. You need consistent leads coming in so you can build an effective business. It's too easy to be so focused on the project at hand and to neglect your client pipeline. Cultivating new leads is a great habit to build, but working with past clients sure takes a lot of footwork out of the process.

Once you've written that killer proposal, handed over the goods and see that everyone's happy with the results, don't leave it there! Follow up and take an interest in how things work out further down the road.

The number 1, absolute best way to ensure a high number of non-repeat clients is to forget about them after you hand over the final deliverables.

Take a look at this excerpt from The Trusted Advisor.

> *"The truth is there's nothing more destructive to trust than to call (a client) only when we want something. Great trusted advisors stay in regular contact with their clients, even if they are not currently working on a project for that client. To maintain trust when the project is over, we must recognize that it's never over, as long as we check in. The impact of our work continues long after we are gone, and in ways we often can't imagine."*

When was the last time you wrote a past client to see how they're getting on? You cared enough to win the contract, so care enough to see how they're getting on. Set up a calendar reminder and check-in periodically. If you find something that could be of interest to them, send it along.

Taking an interest in past clients can be the difference between a one-off gig and an on-going relationship. Once you've worked with a client, writing a second or third proposal will be so much easier.

Learn to write great proposals, do an even better job and you can say hello to a new long-lasting relationship.

Good luck!
Nathan

PS. If you'd like to receive a copy of all the resources from this book, including the Value Based Pricing template from Philip Morgan, then be sure to follow this link and sign up. You'll get lots of proposal goodness sent straight to your inbox.