

Start Your Web Design Agency

*A step-by-step guide*

*by Patrick Spiegel*

Welcome → This Step-By-Step Course is designed for web designers, developers, or anyone looking to start and grow a successful web design business. It provides a complete roadmap for selling web design services and running your business efficiently.

# What you’ll learn:

## Business Foundation

[1.1 Agency vs Freelance](#_u0leflgwe2vv)

[1.2 Niche Selection](#_u0leflgwe2vv)

[1.3 Market Research](#_gw9yfxv3py7f)

[1.4 Competitor Research](#_ipj7gqxgck7v)

[1.5 Offer Creation](#_m62fvu326fee)

[1.6 SOP & Proposal](#_esqhlfd0a2gc)

[1.7 Portfolio](#_cds8ku6jsolg)

[1.8 Your Website](#_qw1jry5xom14)

## Client Acquisition

[2.1 First 3 Clients](#_7istaslgad41)

[2.2 Outreach](#_pgwqjznzpg2f)

[2.3 Inbound Funnel](#_pgwqjznzpg2f)

[2.4 Partnerships](#_niewfzrqmi27)

[2.5 Paid Ads](#_pgwqjznzpg2f)

## Closing the Client

[3.1 Booking the Appointment](#_3zpmv8vrqjsl)

[3.2 Sales Calls](#_3zpmv8vrqjsl)

## Service Delivery

[4.1 Onboarding](#_n9lgynghnrg)

[4.2 Service Fulfilment](#_16hlnkm5903z)

[4.3 Outsourcing](#_1a91onvj3mgj)

# Let’s get started 👇

Some of you going through this course will scale your business to $10K - $50K /month within the next 12 months, while others will struggle to make $1,000 in total. → Let’s take a look at how you can be among those who achieve real success.

How to use this Course:

1. Complete It 100%: Don’t skip sections → *Even if you think you already know certain topics. No matter where you are in your business journey, I guarantee there’s valuable information you haven’t come across yet*.
2. Check List: Open the [WAA | Course Checklist](https://docs.google.com/document/d/1mqm8CLVAg6-KF4kJ7Im7iUwahLi6l89DPBZna3VLckc/edit?usp=sharing) and make a copy → *As you progress through the course, complete the* ***“✍ To Do”*** *tasks after each section and check them off in your document. This will keep you accountable and ensure you take action.*
3. Value Over Money: Your goal shouldn’t be to make money → *it should be to provide as much value as possible. The more value you bring to your clients, the more money you’ll naturally earn in return.*
4. Take Action: Don’t overthink it, just start → *The biggest thing that holds most people back is waiting for everything to be perfect. Instead of spending weeks tweaking the "perfect" outreach script, choose one and test it in the market today.*
5. Yes You Can: Read that again → *The only thing standing between you and your goals is you. Believe in yourself, take action, and build the business and life you want. Let's get started!*

If you haven’t yet, make sure to join the “[Free WAA](https://www.skool.com/webagencyaccelerator)” to get this document along with getting access to exclusive content, free group coaching calls and more! 👉 [JOIN HERE](https://www.skool.com/webagencyaccelerator-free)

# Business Foundation

Every successful web design business starts with a strong foundation. If this stage is rushed or done incorrectly, everything that follows—client acquisition, service delivery, and scaling —will be far less effective. This section will guide you through the essential first steps—deciding between freelancing or starting an agency, selecting a niche, understanding your market, researching competitors, crafting an irresistible offer, your SOP and website. By building these core elements, you’ll create a clear direction for your business and establish yourself as a trusted expert in your field.

## 1.1 Agency or Freelance

Let’s start off with the very first decision in your business journey: choosing between freelancing and starting an agency. This choice lays the foundation for your entire business model, influencing everything from your daily operations to your long-term growth strategy.

* Note: Regardless of whether you choose to operate as an agency or a freelancer, the core operations of your business can remain largely the same as you can still outsource your work. The primary difference lies in how your business is perceived by clients.
* Freelance - Personal Brand with a Solo-Agency Option:
  + As a freelancer, your business is centered around you. Your name, skills, and reputation form the foundation of your personal brand. Freelancers often:
    - Enjoy the flexibility of running a “solo agency,” where they outsource work to trusted collaborators while maintaining a personal connection with clients.
  + Freelancing works well for those who value creative control and direct client relationships, but scalability may depend on how effectively you outsource.
* Agency - Professional Brand with a Team Approach:
  + An agency, on the other hand, focuses on building a *company brand* that represents a team or entity rather than an individual. Agencies typically:
    - Develop professional branding elements like a company name, logo, and website to establish a broader market presence.
  + Agencies are ideal if you plan to scale operations, work with a team, and position yourself as a larger, more professional entity.
* My suggestion: Start out as a freelancer (*or solo agency*) and build your personal brand; It’s easier to build trust as a person rather than a logo (*especially with no social proof*) and you can always switch later on.
* Business Set-up: Once you’ve chosen your path, it’s time to set up the relevant infrastructure, such as designing a logo if you’re building an agency, creating a professional email address, deciding on a business name, buying your domains etc.

✍ To Do: Decide what type of brand you want to build (*10 minutes*) → set up infrastructure (*1-3 days*).

## 1.2 Niche Selection

Having chosen your brand's direction, you need to select your niche! This will be one of the most important decisions you’ll make as it will determine who you work with and what your offer is going to be. Some of you won’t want to niche down but I recommend you do, and here’s why:

* Why should you niche down:

1. You’ll be perceived as an expert in your niche; why?
   * + Would you trust a general mechanic to service your Lamborghini? Probably not. You’d want an expert—someone who specializes in high-performance cars and understands their unique needs.
     + The same logic applies to businesses. If a general web designer and a web designer specializing in solar companies both pitch to a solar company, who do you think they’d choose? That’s right—the specialist. They have industry-specific experience, understand the challenges and goals of solar businesses, and can deliver a website tailored to their exact needs.
2. You’ll be able to optimise your service processes by creating SOPs → making your business more efficient & effective.
3. Your marketing efforts will be enhanced as your outreach and inbound funnels will be targeted and focused → increasing conversion rates.
4. It can lead to more referrals as your brand becomes more known in your niche.

* What is a niche:
  + Industry: Specialize in industries like "health and wellness" or more specific like "dentists".
  + Service: Focus on services like "high-converting landing pages" or "Booking systems for service providers".
  + Tool: Become an expert in tools like "Webflow" or "Shopify".
* [WAA | Web Design Niches](https://docs.google.com/document/d/1xDtpxka9KIT4OG0fcmxxX403J-bcZiHHZLUcwwmQ9hg/edit?usp=sharing)
* Start with your skills (*design*), then your experience (*5 years in construction*), or if you don’t have either then go with your interests/passion (*fitness*).
* Factors to consider:
  + How much money does your niche make? Size of industry & ticket (*their product*).
  + Is it recession-proof (*such as healthcare*)?
  + Are website services important to their success?

✍ To Do: List 3 potential niches (*30 min*) → Research demand & competition (*2 hours*) → Validate with market trends & competitors (*1 hour*) → Choose your niche (*30 min*).

## 1.3 Market Research

Now we’ve chosen our niche (*target audience*), we need to conduct market research to understand them better → who they are, how they run their business and their challenges and goals. This is vital for creating an offer that truly resonates with our clients because ultimately, the market dictates what will work (*the market wants what the market wants*). However, it’s also important to recognize that it’s not just offering what the market wants, but what it truly needs.

1. Identify Target Audience: Clearly define who your ideal clients are.
   * Who: Who is your ideal client and what characteristics do they have?
     + Business Type**:** Identify the specific businesses or professionals within your niche.
     + Demographics (*if relevant*): Age, location, gender (*if relevant*), and industry-specific roles.
     + Size and Scale: Are they solo entrepreneurs, small teams, or medium- or large-sized businesses?
     + Business Values: What principles or qualities does the business prioritise in how it operates (*e.g. premium quality, efficiency, affordability*)?
     + Income/Revenue Range**:** Understand their typical earnings or revenue, and where possible, consider their profit margins to better gauge their financial capacity and needs.
     + Digital Presence: Assess their current online presence—do they have a website, active social media accounts, or other digital platforms, and how effective are these in achieving their goals?
   * What: What services or products do they offer and who do they help (*what value do they bring*)?
     + Services/Products: Outline the main services/products they provide to their customers.
     + Service Pricing: Determine the typical price range of their services or products.
     + Target Customers: Identify who they serve.
     + Value Proposition: What unique benefits or solutions does the business offer its clients that set it apart (*e.g. convenience, expertise, cost savings*)?
   * Where: Where can you connect with them (*for research and marketing [outreach & content] purposes)*?
     + Social Media: Determine which platforms they use most (*e.g. Instagram for visually focused businesses like fitness or restaurants, LinkedIn for B2B industries*).
     + Forums & Groups: Look for niche-specific communities on platforms like Reddit, Facebook Groups, or LinkedIn Groups.
     + Events & Meetups: Attend networking events, expos, or local business meetups to connect with clients directly.
     + Collaborative Partners**:** What companies or service providers do they often work with (*marketing agencies, photographers, or branding consultants*)?
     + Physical Locations (*if applicable*): What online directories are they on or can you find them on Google Maps?
2. Analyse Target Audience: Understand your target audience better to determine how your service adds value.
   * Current Operations: How do they currently run their business?
     + Client Acquisition Strategies: How do they currently attract and retain clients? Are they relying on word of mouth, referrals, social media, paid ads, or networking?
     + Technology and Tools: What digital tools or platforms are they already using to manage their business? This could include scheduling software, CRM systems, email marketing platforms, or website builders.
     + Operational Processes: What systems do they have in place for managing day-to-day operations, such as bookings, client communication, payments, or inventory?
     + Marketing Efforts: How do they promote their business? Are they investing in social media, SEO, email campaigns, or offline methods?
   * Pain Points: What barriers or limitations are holding their business back?
     + Operational Bottlenecks: What processes or systems are slowing their business down?
     + Client Acquisition Struggles: Are they having trouble attracting or retaining clients?
     + Limited Resources: Many businesses lack time, staff, or expertise to handle critical tasks.
     + Technical or Marketing Limitations: Identify areas where their lack of expertise in technology or marketing is a barrier (*This could be where you look at their website or funnels specifically*).
   * Desires: What are their ultimate ambitions? These include the outcomes they want to achieve for their business and their clients.
     + Efficiency and Automation: Business owners often aim to save time and reduce manual work through better systems.
     + Brand Authority: Many businesses aspire to be recognized as leaders in their industry.
     + Revenue Growth: Increasing sales or leads is a universal goal for most businesses.
     + Client Engagement: Businesses often seek ways to engage better with their customers online.
   * 99 Problems: Write down 99 problems your ideal clients face—whether in their business, marketing, tech, or daily operations. This will help you:
     + Deeply understand your clients, what they struggle with, their frustrations, and what they truly need.
     + Recognize the full value of your services and all the different ways you can help them.
     + Identify gaps in the market and tailor your services to solve high-priority problems.
     + Clearly communicate how your service makes a real impact, making sales and marketing much easier.
     + Create highly targeted outreach, content, and sales arguments that resonate with your audience.
     + Position yourself as a problem-solver, not just a service provider, which helps you stand out from competitors.
3. Collecting the Information:
   * Search Engines: Use tools like Google, ChatGPT, industry reports, or studies to uncover broader trends in your niche.
   * Analyse Socials, Websites and Feedback: Look at websites, social media and testimonials, reviews or case studies of:
     + Your competitors: To identify common challenges and successes of your target audience (*For: 1.3.2 Analyse Target Audience*).
     + Your Target Audience: To find out more about their services (*For: 1.3.1 Identify Target Audience - What*).
   * *(Start with the above mentioned methods before continuing with the following:)*
   * Genuine Conversations: Have direct conversations via social media (*reaching out directly or via groups*), networking events or visiting your clients (*if they have physical locations*).
   * Surveys and Polls: Create short surveys using tools like Google Forms or Typeform.
   * Competitor Feedback: If possible, engage with clients who have worked with competitors to understand what they liked or disliked.
   * Test Offers: Present mock service packages or ideas to gauge interest and get feedback.
   * Pro Tip: Offer gifts or something in return when having conversations with your target audience (*e.g. gift card, free audit*).

✍ To Do: Identify target audience and select 10 businesses (*1-2 hours*) → Identify where to connect with them (*2 hours*) → Analyse Target Audience (*3-4 hours*) → Connect with with (*ongoing*).

## 1.4 Competitor Research

Before we can create an irresistible offer, we need to dive into competitor research to uncover what’s already working in the market and where the biggest opportunities lie (*make sure to focus on direct competitors*).

1. Identify competitors: Search for competitors in your niche via google, social media, service platforms or with the help of AI.
2. Analyse competitors: Find out what your competitors are doing for their clients that you can model.
   * Analyse Website: Structure, Key features/elements, Blog, SEO Keywords (*& ranking)*, FAQs, CTAs.
   * Services and Pricing: What do they offer, what are their prices or packages (*keep the size and experience of competitors in mind*).
   * Identify Unique Selling Point (*USPs*): What makes them stand out such as speed of delivery, niche expertise, specific service feature etc.
   * Evaluate Marketing Strategies: Social Media, Blog content, Ad Campaigns.
3. Analyse social proof: You can find great insights into what they do well or bad by looking at:
   * Testimonials & Reviews: Website, GMB, Trustpilot, Clutch.
   * Case Studies: Great for key & unique deliverables/processes
4. Identify Gaps: What do competitors lack and highlight how you can differentiate yourself.

✍ To Do: Identify and shortlist 5 competitors (*1-2 hours*) -> Analyse competitors (*3-6 hours*).

## 1.5 Offer Creation

With your market and competitor research in hand, it’s time to create an offer that directly appeals to your niche. A great offer doesn’t just sell—it solves a problem, fulfils a desire, and creates undeniable value. This section will show you how to craft a winning offer step-by-step, including formulas, examples, and tips for success.

Remember: “*Value is added when Pain is alleviated* → *Pain is alleviated when Problems are Solved*” - Charlie Morgan.

* What Makes a Great Offer:
  + Clear Value Proposition:
    - How does your service solve a specific problem or deliver an outcome your audience desires?
    - Example: "We create high-converting websites that help service-based businesses double their inbound leads in 90 days—or we work for free."
  + Specific Outcomes:
    - Focus on tangible results, not just deliverables.
    - Example: "We design conversion-focused websites with booking systems that help fitness coaches increase their monthly appointments by at least 20%."
  + Irresistible Guarantees:
    - Remove risk for the client by offering guarantees.
    - Example: "We guarantee a 20% increase in online bookings, or we optimize your site until it does."
  + Strong Differentiation:
    - Highlight what makes your offer unique compared to competitors.
    - Example: "Specialized in e-commerce websites for handmade product sellers."
  + Exclusivity (Scarcity & Urgency):
    - Encourage immediate action by limiting availability and setting clear deadlines.
    - Example: "Only 15 spots available this month—first come, first served. Offer ends Friday at midnight!"
  + Bonuses or Incentives:
    - Sweeten the deal with free add-ons or limited-time offers.
    - Example: "Sign up today and get one year of free website maintenance."
  + Pro Tips:
    - Always lead with value. A website has three main components: “Traffic, Trust, Conversions”. You can choose to deliver on all 3 with your offer or you can choose to focus on 1 or 2.
      * Examples: Traffic (SEO, Ads, Social Media content) ,Trust (Great Design, Content), Conversions (Lead magnets, CRO Optimisation).
    - Never say “increase your online presence”. This literally means nothing to the client and is way too vague without a clear value driven outcome.
* Crafting Your Offer: Use the insights from your market research to create a tailored offer. Follow this formula:
  + Formula: (*Target Audience’s Goal*) + (*Solution You Provide*) + (*Pain Points You Address*) + (*Guarantee or Bonus*) = Your Offer.
  + Example:
    - Goal: Generate more leads for fitness trainers.
    - Solution: Design high-converting landing pages with booking systems.
    - Pain Points: Difficulty managing bookings, no time to market themselves, outdated website.
    - Guarantee/Bonus: "If your leads don’t double within 60 days, we’ll optimize your website for free."
  + Example Offer: "We design high-converting landing pages for fitness trainers that integrate with booking systems and double your leads within 60 days—or we’ll optimize your site until it does!"
* Types of Offers with Examples: Here are some example Offer structures you can use as inspiration:
  + Website Packages: Having clear tiers helps clients quickly see which option best fits their needs and budget. Examples:
    - Starter: $3,500 | 1-Page High-Converting Website, Mobile-Optimized & SEO-Ready, Clear CTA & Booking Integration.
    - Advanced: $5,000 | 5-Page Custom Website (Home, About, Services, Portfolio, Contact) Advanced SEO Setup & Blog Integration, Conversion-Optimized.
    - Premium: $7,500+ | Fully Custom-Tailored Design, E-commerce, CRM, or Advanced Funnel Setup, SEO, Analytics, and A/B Testing.
  + Website in a Week (*Fast Turnaround*):
    - Best for: Entrepreneurs who need quick turnaround and are willing to work with templates. Also offering a "Website in a Week" service at a fixed price makes decision-making easier for clients with urgent needs.
    - Example: "A conversion-focused website, designed & launched in just 7 days—so you can start getting clients faster. $3,000."
  + Recurring Revenue Services: Long-term revenue and ongoing client retention can be achieved through monthly services.
    - Maintenance Packages: Example: "$99/month for monthly updates (*2 hours of work*), backups, and performance checks."
    - SEO Optimisation: Example: "$500/month for ongoing keyword research, blog optimization, and ranking reports, 3 blog posts."
    - Conversion Rate Optimisation: Example: “$600/month for A/B testing, heatmap analysis, and funnel optimization to increase sales and lead generation.”
  + Custom Projects:
    - For businesses with specific needs that don’t fit into standard packages, offer fully custom solutions (*price will be adjusted per customer*).
    - Example: "Starting at $6,500 for a custom-designed website tailored to business goals and branding, including automations and integrated crm.”
  + Bundles & Add-ons: Offer complementary bonuses & Add-ons to maximise the value of each sale. Examples:
    - Lead Magnets**:** Custom brochures, checklists, or e-books (*included in package to optimise conversions*).
    - Press Release**:** Get featured in industry publications for credibility (*$99 add-on*).
    - Branding Package**:** Logo, color palette, and brand guidelines (*$1,250 add-on*).
    - GMB Optimization**:** Google My Business setup for local SEO (*$350 add-on*).
  + Pro Tip: Adding limited-time incentives (*e.g., "Sign up today and get 3 months of CRO for free."*) can drive urgency and boost conversions.
* How to determine what works for your niche.
  + Revisit Your Market Research:
    - What are the key goals of your niche?
    - Example: "Small gyms want to increase bookings and retain members."
    - What pain points need solving?
    - Example: "They struggle to get local customers and have a good CRM system."
  + Tailor Your Solution:
    - Match your services to their needs and pain points.
    - Example (*for gyms*): A booking system integration and local SEO (*+ Ads*).
  + Factor in Price Sensitivity:
    - Use competitor research to set competitive yet profitable pricing.
  + Consider Scalability:
    - Start with simple packages and offer upgrades to higher tiers or recurring services.
* Steps to Build Your Offer

1. Define the Core Services: Start by identifying your main service and what problem it solves.
   * Example: "Custom landing page for coaches to help them get customers and streamline their booking process."
2. Identify Add-ons: List complementary services that increase value and revenue.
   * Example: SEO setup, CRM and automations integration, GMB set-up.
3. Set the Price: Base it on the value provided, market rates, and client expectations.
   * Example: $3,500 setup + $500 per month (*for addons*)
4. Write a Clear Offer Statement: Use the following formula to create your offer that highlights the benefits not just features: (*Target Audience’s Goal*) + (*Solution You Provide*) + (*Pain Points You Address*) + (*Guarantee or Bonus*)*.*
   * Example: "We design conversion-focused websites for personal trainers that increase bookings by 20% in 60 days—or you’ll get 100% money back."
5. Test and Refine: Before launching, present your offer to at least 10 ideal clients and get feedback. Refine based on their questions, concerns, and objections.

* Pricing & Payment Structure: Once your offer is set, you need a clear pricing and payment structure to ensure smooth transactions and cash flow.
  + Payment Terms: To secure commitment and avoid unpaid work, always collect an initial deposit. Here are different ways to structure payments:
    - Milestone-Based Payments: 50% upfront, 25% after design approval, 25% after development & final delivery. (Best for full website projects.)
    - Split Over Time: 25% (or 50%) upfront, then equal payments over 2-3 months. (Best for clients needing flexible terms.)
    - Subscriptions: ($X/month for X months) Allows clients to split costs while securing recurring revenue and is best for monthly recurring services.
  + How to Calculate Price: Figuring out what to charge your clients can be difficult, especially in the beginning. There is no one-size-fits-all formula or pricing method. Oftentimes you just need to present a price to clients and see how the market reacts. When you’re starting out and you haven’t built up your reputation and social proof you'll be charging less, but I would recommend always increasing the price until you’ve hit a good range for the market and your services (*value you’re providing*). To get a rough estimate, look at competitors, industry averages or let me or other experienced agency owners help you in the [Web Agency Accelerator](https://www.skool.com/webagencyaccelerator).
* Checklist for a Strong Offer:
  + Does it solve a specific problem?
  + Does it have clear benefits/outcomes?
  + Does it include a guarantee or incentive?
  + Is it priced appropriately for your niche?
  + Does it differentiate you from competitors?
* Tools for Service Delivery: Here are some recommended tools and software based on the type of service you offer (*Make sure to test and choose the ones that best fit your niche and workflow*).
  + Web Development: [Framer](https://www.framer.com?via=patrickspiegel), [Webflow](https://try.webflow.com/3rkd99edv1qd), [Wordpress](https://wordpress.com/), [Shopify](https://shopify.pxf.io/mOGOo1)
  + UI/UX Design: [Figma](https://www.figma.com/), [Relume](https://www.relume.io/),
  + SEO & Analytics: [Search Atlas](https://dashboard.searchatlas.com/register?fpr=patrick38) (*AI*), [SEMrush](https://www.semrush.com/), [Ahrefs](https://ahrefs.com/),
  + Automations & Integrations: [GHL](https://www.gohighlevel.com/30-day-trial?fp_ref=patrickspiegel), [Zapier](https://zapier.com/), [Kit](https://partners.kit.com/icr8takslsvu) (*Email*).

✍ To Do: Use the formula provided to create 2-3 tailored offers for your agency and highlight the value, outcomes, and unique aspects of each (*1-2 hours*) Set your pricing & payment structure (*1-2 hours*) Decide what tools you’ll use for service delivery (*2-4 hours*) → Test them with your network or target audience (*1 week or until you’ve found a winning offer*).

## 1.6 SOP & Proposal

Now that we’ve gathered all the vital information about our target audience, competitors, and our unique offer, it’s time to create a structured SOP (Standard Operating Procedure) and proposal. The SOP will serve as your internal blueprint for delivering consistent, high-quality results to your clients while also doubling as a powerful tool to showcase during sales calls or in a VSL, building trust and credibility with potential clients.

* Why You Need an SOP:
  + Preparation: By creating an SOP before you have clients, you ensure that you're fully ready to take on projects without scrambling to figure out processes.
  + Consistency: Deliver the same high-quality results for every client, every time.
  + Efficiency: It streamlines your processes, saving you time and effort.
  + Credibility: Showing your strategy to potential clients on sales calls or in your VSL builds trust, as it demonstrates you have a proven and structured approach.
  + Scalability: It becomes easier to outsource or delegate tasks when you have a clear framework in place.
* How to Create Your SOP:

1. Start with the End Goal: Define the primary outcome you want to deliver to your clients. Use the insights from your market research and offer creation:
   * What is the client’s ultimate goal? (e.g., “Increase conversions by 20%,” “Improve SEO rankings,” or “Attract more local clients.”)
   * What specific pain points or desires are you solving? (e.g., outdated website, poor user experience, lack of organic traffic.)
   * Example: *"To design a user-friendly website that streamlines bookings and increases customer sign-ups by 25%."*
2. Research and Model Proven Strategies: Leverage your competitor research and market research to identify successful approaches in your niche:
   * Competitor Websites (of target audience): Identify key elements they use (e.g., portfolio layout, CTA placement, design styles, testimonials, page structures etc.).
   * Case Studies: Analyze detailed case studies from competitors or agencies in your niche. Look for specific deliverables, workflows, and results they’ve highlighted.
   * Templates: Use platforms like Behance, Dribbble, or Clutch to identify trends and high-performing examples.
   * UniqueDifferentiators: Pinpoint areas where you can innovate or improve on their approach.
3. Define Your SOP: Once you’ve done your research, use the information to define your own SOP (*This can cover the entire client process as shown below or just the “Service Delivery” stage*). You’ll combine the best practices from competitors with your unique approach. The SOP should cover the following key areas:
   * Client Onboarding: Outline how you onboard clients, including what information you collect (e.g., goals, brand assets, audience insights) and how you establish expectations.
   * Project Planning: Detail how you prepare for the project, including research, creating a timeline, and mapping out milestones.
   * Execution (*Service Delivery*):
     + Gather Inspiration and References: Include example wireframes, screenshots of successful websites, descriptive text that outline best practices for each section etc. (*you can use one of your portfolio pieces [next section] or actual client work for this*)
     + Step-by-Step Delivery Process: Define how you’ll use the references to design, develop, and implement the website.
     + Customization and Unique Features: Specify how to adapt the SOP to each client’s specific needs while leveraging standardized best practices.
   * Quality Assurance & Revisions: Specify how you’ll test your work, gather client feedback, and address revisions while managing scope.
   * Final Delivery & Handoff: Describe how you’ll deliver the final product, provide tutorials or documentation, ensure the client knows how to use the deliverables and how to turn finished projects into case studies.
   * Post-Project Support: Define your follow-up support process, including optional maintenance, upsell opportunities and requesting reviews/testimonials.

* What Your SOP Should Include: Once you’ve defined the process, document it clearly so it’s easy to follow and replicate. Here’s what to include:
  + Objectives: What problem are you solving for the client?  
    *Example*: "Create a mobile-friendly website to increase conversions and improve the user experience."
  + Tools/Resources: List the tools you’ll use for each step (*e.g., SEMrush, Figma, Framer*).
  + Step-by-Step Process: Break down each phase into actionable tasks, with details on how to complete them.
  + Timelines: Define how long each step should take and include deadlines for milestones.
  + Quality Standards: Set benchmarks for quality to ensure consistency (*e.g., site speed below 2 seconds, SEO score of 90+, etc.*).
  + Templates/Examples: Include templates, sample designs, or reports you’ll use to streamline the process.
* Proposals: A proposal is a formal document that outlines the scope of work, deliverables, pricing, and terms of your service, ensuring both you and the client are aligned before moving forward (*you’ll use this during the sales process*).
  + Why Proposals Matter: A proposal turns the client’s needs and your strategy into a structured, professional document that builds trust and makes your offer tangible.
  + What a Good Proposal Includes:
    - Cover Page & Branding: Business name, logo, date, and client details.
    - Problem Statement: A summary of the client’s main challenge (based on your discovery call).
    - Research & Competitors: Present the research you’ve done on your clients competitors.
    - Your Strategy & Solution: How you’ll solve their problem, with key deliverables (can be linked to SOP).
    - Project Timeline & Milestones: Expected timelines for each phase.
    - Pricing & Payment Terms: Pricing structure (one-time, milestone-based, retainer).
    - Guarantees or Risk Reversal: Any money-back guarantees or reassurances.
    - Call to Action: Next steps, how to proceed.
    - T&Cs (*Contract*): Include key terms, such as payment policies, project scope limitations, and revision policies, ensuring it doubles as a contract to protect both parties. Use one of the tools below to get the client to sign it.
    - You can also include optional add-ons or an upsell section.
  + Tools: [Miro](https://miro.pxf.io/1razxD), [Bonsai](https://www.hellobonsai.com/?fp_ref=patrickspiegel), [PandaDoc](https://www.pandadoc.com/business-proposal-templates/design-proposals/), [Pitch](https://pitch.com/templates/collections/Proposal).

✍ To Do: Research top-performing competitors and note their processes (*3-4 hours*) → Outline your step-by-step SOP (*2-3 hours*) → Create your proposal template (*2-3 hours*) → Test and refine your SOP with mock or real projects (*ongoing*).

## 1.7 Your Portfolio

A strong portfolio is essential for building trust and showcasing your expertise, even if you don’t have clients yet. By creating tailored example projects for your niche, you can demonstrate your skills and problem-solving abilities. Using insights from your niche selection, market research, and competitor analysis, you’re ready to craft a portfolio that resonates with your ideal clients.

* Showcase Niche-Specific Designs: Focus on creating examples that directly appeal to the businesses or professionals in your niche. Use your SOP to follow a structured workflow and practise real-world project execution:
  + If your niche is fitness: Design a high-converting website for a gym or personal trainer, complete with class schedules and booking integrations.
  + If your niche is dentists: Showcase a sleek website optimized for local SEO and featuring online appointment booking systems.
  + If your niche is e-commerce: Create a Shopify store mockup with seamless navigation, product pages, and a conversion-focused checkout process.
* Highlight Your Offer: Ensure that each example in your portfolio reflects your core offer.
  + If you specialize in funnels, include landing pages that demonstrate lead capture forms and CTAs optimized for conversions.
  + For SEO services, present before-and-after rankings or sample SEO-optimized blog layouts.
  + For design services, emphasize creative layouts, typography, and mobile responsiveness.
* Use a Variety of Formats: Make your portfolio visually appealing and easy to understand by including:
  + Screenshots and Mockups: Showcase web pages, landing pages, or funnel designs on devices like laptops or mobile screens and use “before & after” shots to highlight the improvements.
    - [The BEST Mockups for Web Designers (free & paid)](https://youtu.be/CErYAhmb7kE)
  + Case Study Format: Even if it’s fictional, write about the “problem” and how your design solved it (*make sure to specify that it’s a concept and not a real client*).
  + Interactive Prototypes: If possible, create clickable prototypes using tools like Figma or Framer (*if you’re developing websites for your service, create one working website as a portfolio piece*) to give potential clients a hands-on experience of your work.
* Make It Specific: Tailor each example to address the pain points and desires of your niche, based on your market research. Use realistic text and features:
  + Add relevant imagery, like stock photos of dentists for a dental website.
  + Write realistic copy that reflects their goals, such as “Book your consultation today to transform your smile!”
* Include a Call-to-Action (*CTA*): At the end of your portfolio examples, include a CTA to encourage visitors to take the next step such as a link to your contact form or schedule a consultation.
* Real or Fake Companies: If you don’t have clients yet you can use real or fictional companies to help build your portfolio.
  + Real: Find businesses with poor websites (*if that’s your service*) and redesign key pages. However, do not present these as actual client work. You can also use the redesigns as a form of outreach and send them the design and a personalised video as upfront value (*more on that in 2.2 Outreach*).
  + Fake: This is the safest approach where you can invent fictional companies for your portfolio pieces with creative freedom. You can use platforms like [Unsplash](https://unsplash.com/), [Pixabay](https://pixabay.com/), [Pexels](https://www.pexels.com/) and [Stills](https://www.stills.com/) for stock photography.
* Where to Showcase: Present your portfolio pieces on: Your Website (*next section*), Behance & Dribbble (*great for creative niches*), LinkedIn & Instagram, Facebook & LinkedIn Groups and any Freelance Platforms.
* Pro Tips:
  + Start with 3–5 strong examples to keep your portfolio concise and focused.
  + Use tools like [Figma](https://www.figma.com/), [Canva](https://www.canva.com/), or [Framer](https://www.framer.com?via=patrickspiegel) to create polished designs.
  + Update your portfolio regularly as you gain real clients and projects.

✍ To Do: Choose your niche-specific project ideas (*30 minutes*) → Use your SOP to structure and execute portfolio examples (*2-4 hours per project*) → Create 3–5 strong portfolio pieces (*ongoing*) → Showcase work on website & platforms like Behance, Dribbble, LinkedIn (*1-2 hours*).

## 1.8 Your Website

With your niche, market research, competitor analysis and portfolio completed, it’s time to create your website that builds trust with your audience. Let’s outline the key elements to include to start converting some clients.

* Important: Speed is key here so don’t take weeks coming up with the perfect and unique design, instead use a template or simple structure (*make it unique of course*) and get it done within a couple of days. Also remember to use tools like ChatGPT to save time when writing the content.
* Tools: There are multiple tools you can use to build your website as mentioned previously, and I’d recommend using the same tool that you’ll be using for your clients projects. I’d recommend: [Framer](https://www.framer.com?via=patrickspiegel), [Webflow](https://try.webflow.com/3rkd99edv1qd), [GHL](https://www.gohighlevel.com/30-day-trial?fp_ref=patrickspiegel).
* Your CTA: In order to convert visitors into interested leads or appointments we need a strong CTA (*Call To Action*) that guides them to your desired next step which could be to get in touch with you, view your services or get a free lead magnet (*I would recommend minimising the steps they need to take to become a client - so booking a call will most likely be the best option*).
  + Examples: “Book a Free Consultation”, “Claim Your Free Website/SEO Audit”, “Get Our Free SEO Checklist”, “Book a Free Demo”.
* Structure: I’d recommend creating a one-pager landing page to start off (*most website builders have a free or cheap plan for 1 page websites*) as this will be more than enough. Then later on (*or now if you want*) you can build out the rest of your website with additional pages such as services, blog posts, case studies etc. (*this will also help with SEO*). For now let’s take a look at an optimal landing page structure:

1. Hero Section: This is the first thing visitors see and should immediately convey the following information:
   * Benefit Driven Headline: A clear concise headline that communicates your offer.
     + Examples: “Websites That Get Dentists More Patients”, “Helping Coaches Land More Local Clients”.
   * Subheadline: This should describe to your customer what you do, who it’s for and how it will make their life better.
     + Examples: “Our custom dental websites are designed to attract more leads, build trust, and grow your practice.”, “With our funnels and SEO, we’ll get you more clients, so you can focus on changing lives.”.
   * CTA: What should they do next?
     + Examples: “Free 30 Min Consultation”, “Get Your Free Website Audit”.
   * Extras: Social proof or guarantees, and key benefits.
     + Examples: “100% Money-back Guarantee”, “34 5-Star Reviews”, “Build Trust, Save Time, Attract More Clients”.
   * Visual Elements: Visual imagery is a powerful way to showcase your value, often more effectively than words alone.
     + Examples: Your designs (*if your services are visual and design related*), graphs or numbers (*for SEO or funnel services*), professional picture of you (*for personal brand*).
   * VSL (*optional*): A Video Sales Letter is a great way to build trust and convey your value (*especially when you don’t have social proof*).
     + Attention: Hook your audience with a pain point or bold statement.
     + Problem: Explain the challenges your target audience faces (use insights from your market research).
     + Solution: Present your services as the solution.
     + Benefits: Outline how your solution improves their business.
     + Social Proof: Include client testimonials or portfolio highlights.
     + CTA: Conclude with a clear and actionable step.
2. Logos: If you have past clients you’ve worked with, then create a “Trusted by” section with a row of logos.
3. Portfolio: If your services are design related then showing a sneak peek of your portfolio can be a great way to build some trust.
4. Reviews/Testimonials: If you’ve collected reviews or testimonials from past clients then showcase them here.
   * Example Structure: “Before I was struggling with [problem] and it made me feel [negative emotion]. Now I have achieved this [result] and I feel [positive emotion].”
5. Pain/Solution: Refer back to your market research to highlight common problems your target audience has and how your services are the solution to their pain (*also remember to add small CTA buttons*).
   * Example Structure: Mention problem, remind them what the cost is of not solving the problem, demonstrating a positive outcome that they want, then setting ourselves up as a solution to that problem.
6. CTA: Add a CTA section (*banner for example*) with a phrase to remind people why they should take action. This could either include a testimonial to grab their attention or a lead magnet to offer value.
7. Process: Clients like to have clarity about what to expect when working with you, so clearly outline your workflow with concise steps and descriptions.
   * Example: Discovery → Strategy → Design & Development → Testing & Launch.
8. Key Benefits: Highlight the main values or benefits of your services with short impactful points.
   * Example: “Fast Delivery, Highest Quality, Results Guaranteed”.
9. Case Studies/Portfolio: Use case studies with key outcomes or results (*like conversion rate or SEO statistics*) to further build trust. If you don’t have clients yet then showcase your portfolio or designs here.
10. About: While not essential, including an "About" section can help create a personal connection with your audience and strengthen your brand image. Use this space to share your personal journey, highlight key values, or explain the inspiration behind your brand and why you want to help your clients succeed.
11. Reviews/Testimonials: If applicable you can add a small section with some more reviews or testimonials.
12. FAQ: Address common questions your clients would have, to ease doubts or concerns. You can use the following ChatCPT prompt to help with this (*or go back to your market research*).
    * Prompt: [client description] is thinking of hiring a [service type] what questions would they have before they are ready to book?
13. Final CTA: End the page with a powerful CTA that speaks directly to your audience’s pain points and goals. You can address their struggles with a headline “Does This Sound Familiar?” with a list of a few key challenges they face. Followed by the opposite headline “Now Image…” with a list of their desired outcomes, and a CTA after that. You can also add a “This Is Not For You if…” section to filter out non-ideal clients, which reinforces exclusivity.

* Extra Pages: Once your landing page is set up and you’re ready to expand, consider adding these pages to enhance your website's functionality, SEO, and client engagement:
  + **Services Page:** Provide detailed descriptions of the services you offer.
  + **Case Studies Page:** Showcase specific examples of your work, complete with before-and-after visuals, results achieved, and client testimonials. Highlight measurable outcomes (e.g., increased conversions, improved user experience).
  + **Blog:** Publish regular content tailored to your niche, addressing client pain points and showcasing your expertise. Use keyword research from your competitor and market analysis to boost SEO.
  + **Resources Page:** Offer lead magnets such as free guides, templates, or checklists to attract and capture leads.
  + **Contact Page:** Provide a simple form, call booking link, email address, and phone number for easy communication. Include links to your social media accounts for additional touchpoints.
  + **Portfolio Page:** Expand on the portfolio section from your landing page to include a comprehensive collection of your work. Organize projects by category or service type for easy navigation.
  + **Testimonials/Reviews Page:** Collect all your client testimonials in one place to build credibility. Use visuals, like star ratings or video testimonials, to make them more engaging.
  + **FAQ Page:** Create a standalone page to address detailed questions about your services, process, and policies. Link to it from your landing page for easy access.

✍ To Do: Choose tool (*30 minutes*) → Either create your wireframe or select a template (*2 hours*) → Create the landing page (*1 week*).

# Client Acquisition

Now that you've built the foundation of your business—establishing your brand, identifying your niche, and crafting irresistible offers—it's time to connect with potential clients, showcase your value, and start booking appointments.

Process: Taking Offer to Market (*cold lead*) → Booking Appointment (*warm lead*) → Sales Call (*closing lead*).

* Booking The Call: Most of the selling will be done via a sales call, which is the most effective way to close clients. Before diving into lead generation strategies, let’s first ensure your booking process is seamless and effective.
  + Tools: [Cal.com](http://cal.com), [Calendly.com](http://calendly.com), [Google](https://support.google.com/calendar/answer/10729749?hl=en).
  + Questions: Having questions can you pre-qualify leads.
    - Basic: Name, Business Name, Website URL (*if applicable*).
    - Contact: Email, Phone Number.
    - Additional Notes: Allow them to add anything relevant.
    - Optional: These are some optional questions you can add.
      * **Business Type & Industry:** Helps you understand their niche.
      * **Current Challenges:** Ask, “What problems are you hoping to solve by working with us?”
      * **Goals & Desired Outcomes:** “What are you hoping to achieve in the next 6-12 months?”
  + Reminders: Just because a lead booked in a call with you doesn’t mean they are going to show up. Make sure to collect their phone number and email address on your call booking page. Then automate reminders (for *1 day, 1 hour, 15 minutes in before the call*) that can include some value or case study/testimonial to further build excitement and trust.

✍ To Do: Choose tool (*10 minutes*) → Create Booking page with questions (*1 hours*) → Set up reminders (*1 hour*).

## 2.1 Your First 3 Clients

Selling your services is all about building trust with potential clients which is difficult when you’re just starting out. So here are 3 methods I have personally used (*and most web designers have*) that you can use to get your first clients.

* Family & Friends: Your family, friends, and acquaintances already trust you, which gives you a huge advantage in building confidence and credibility.
  + Make an Announcement: Share that you’re starting a web design business on your personal social media profiles, in group chats, or in person (*you can also send a message to all your contacts*).
    - Example: “Hi everyone! I’ve just launched my web design business, and I’m offering discounted rates for my first few clients. If you or someone you know needs a website, let me know!”
  + Offer a Discount or Free Initial Service: To make the offer more appealing, consider offering discounted rates, free consultations, or a smaller project at no cost (*e.g., a simple one-page website*).
    - Example: "I’m offering 50% off my services to the first three clients who work with me!"
  + Leverage Word of Mouth: Encourage family and friends to spread the word about your services, and incentivize them to help you through a commission or a token of appreciation.
    - Example: “If you know anyone who might need a website, I’d be super grateful if you could send them my way. For every referral that becomes a client, I’d be happy to offer you (*a gift card, a percentage of the project fee, or a flat referral bonus)* as a thank-you.”
  + Pro Tips:
    - Keep the scope of work manageable to avoid overcommitting early on.
    - Treat family and friends as you would professional clients—use contracts and maintain high-quality communication to build habits for future projects.
    - Request testimonials and referrals after the project is complete to add credibility to your business.
* Local Businesses: Small businesses in your area are often looking for affordable and reliable web design services, making them an ideal target for your first clients. Many local businesses lack an online presence or have outdated websites or could be in need of local clients, which creates an opportunity for you to add value.
  + How to Approach Local Businesses:

1. Research Prospects: Walk around your neighborhood or use Google Maps to identify businesses that could benefit from your services. Look for outdated websites or businesses without an online presence.
2. Offer a Free Audit: Provide a free website audit or consultation to show the business owner where they can improve.
   * Example: “Hey, I’ve walked past your business a few times and thought I’d pop by and say hi, and to be completely honest I’m not looking to buy [service] right now, but I’ve had a look at your website and [point out their values + possible achievements] and found a few areas where you could attract more customers, and I’d love to show you how a few small changes can make a big difference and help you stand out from your competitors like [competitor] just down the road for example. And that's completely free of course.”
   * You can also use the upfront-design method we briefly talked about earlier and present it to them.
   * *Remember to smile and be polite ;)*
3. Leverage Community Involvement: Attend local business meetups or sponsor a community event to build your reputation and get your name out there.
4. Co-Working Spaces: Co-working spaces are thriving hubs for small business owners, entrepreneurs, and freelancers—all of whom may need a professional website or SEO services to grow their ventures. Additionally, these spaces offer the opportunity to build valuable partnerships and long-term relationships that can lead to consistent referrals and collaborations.
   * Pro Tips:
     + Be prepared to educate business owners on the value of an updated website if they are hesitant.
     + Follow up persistently but politely after your initial pitch.

* Networking Events: Networking events provide an excellent opportunity to meet potential clients face-to-face and build authentic connections. People are more likely to trust and hire someone they’ve interacted with personally, making this method particularly effective for building relationships.
  + How to Find Networking Events:
    - Local Meetups**:** Search for industry-specific events on platforms like Meetup.com, Eventbrite, or Facebook Events.
    - Chamber of Commerce Meetings**:** Join your local Chamber of Commerce or attend small business gatherings to meet entrepreneurs in need of web design services.
    - Industry Events**:** Attend conferences or expos related to your niche. For example, if you specialize in designing websites for fitness businesses, attend fitness expos.
  + How to Stand Out at Networking Events:

1. Elevator Pitch**:** Have a clear and concise pitch ready to explain who you are and what you offer.
2. Connecting**:** Make sure to exchange contact details or to connect with each other on LinkedIn to stay in touch.
3. Ask Questions**:** Focus on learning about other people’s businesses and pain points before pitching your services.
4. Follow Up**:** After the event, send a friendly email or message to the people you connected with, offering to schedule a free consultation.
   * Pro Tips:
     + Build genuine relationships—don’t make the interaction purely transactional.
     + Look for opportunities to collaborate, even if it’s not directly related to web design (e.g., partnering with a marketing agency).
     + Use a QR code as your phone background that links to your landing page or digital business card for instant connections.

✍ To Do: Announce to family & friends (*1 hour*) → make a list of 10 local businesses and approach them (*1 week*) + *continue after* → attend one networking event per month (*if possible*).

## 2.2 Outreach

Now it’s time to reach out directly to your target audience which is a great way to start getting more clients. We’ll cover what outreach methods you should use, how to find relevant contact information and how to craft a winning outreach message.

* Process: 1. Build lead list → 2. Research & Personalise → 3. Reach out → 4. Follow up → 5. Track & Adjust.
* Outreach Methods: Having identified your target audience and where you can find them (*in: 1.3.1 Identify Target Audience*), it’s time to decide how you’ll be reaching out to them.
  + Cold Calls: Can be very intimidating but is a very effective method to book appointments quickly.
    - Best For: Local businesses, service-based industries and small businesses.
    - Pros: Direct and personal, unique with personality, instant feedback, higher conversion-rates.
    - Cons: Time-dependent (*time-zones*), negative feedback, getting past gatekeepers.
    - Pro Tips: Smile when talking, Pre Call Ritual, be grateful, be calm, be confident.
    - Tools: [GoHighLevel](https://www.gohighlevel.com/30-day-trial?fp_ref=patrickspiegel), [Skype](https://www.skype.com/en/international-calls/), [Phone Validator](https://clearoutphone.io?ref=nti0zjq)**.**
  + Social Media (DMs): Platforms like Instagram, Facebook and LinkedIn are great to connect with business owners and decision makers.
    - Best For: Visually-focused businesses, B2B industries, solo-entrepreneurs.
    - Pros: Less time-dependent, showcase work, upfront value, works with almost all businesses, free.
    - Cons: requires persistence and patience, can be ignored or marked as spam, limited by restrictions.
    - Pro Tips: Warm up accounts, build a brand. Space-out messages, type out messages (*no copy paste*), engage with lead (*likes, comments*).
    - Rules Guide: [WAA - Instagram/Facebook DM Rules](https://docs.google.com/document/d/1VEsqUj6i_iNUr5ZzMSVg503zCxilAlwJ6jZyN80Vb1A/edit?usp=sharing)
    - Tools: [AutoIGDM](https://autoigdm.com/?via=1q1w0&fp_sid=patrick), [PhantomBuster](https://phantombuster.com?deal=patrick95).
  + Cold Emails: Emails are the most versatile method as they can reach almost all industries and if done correctly can be targeted to key decision-makers.
    - Best For: B2B businesses, professional services.
    - Pros: Scalable, Easier to automate.
    - Cons: Lower conversion rate, comes across more spammy, more setup required.
    - Pro Tips: Warm up accounts, use professional email addresses.
    - Tools: [Smartlead](https://smartlead.ai/?via=patrick-spiegel), [Hunter](https://hunter.io/).
* Collecting Contact Information: Now that you’ve selected your preferred outreach method it’s time to gather their contact details.
  + Local Businesses: If your target audience provides local services then there are several sites and platforms you can use to retrieve their details.
    - Google Search: Using Google or Google Maps is still a viable option and when paired with the ChatGPT or Scraper Extension it’s even better. Example video: [How to Generate 1000s of Web Design Leads Per Day in 2025](https://youtu.be/JedAtYEj9w4?si=NS4jX45TS5ePKWT_&t=421)
    - Directories: Besides the general online directories such as ([*Yell*](https://www.yell.com/)*,* [*Yelp*](https://www.yelp.co.uk/)) there are tons of industry specific directories such as ([*Construction*](https://www.construction.co.uk/)*,* [*Tripadvisor*](https://www.tripadvisor.co.uk/)).
    - Magazines: Niche magazines, journals, and trade publications can be valuable for lead generation as there might be companies listed or advertising there that aren’t set-up online.
  + Social Media: Platforms like Instagram, Facebook and LinkedIn are a great place to find leads, and you can use the following methods to find them.
    - Groups & Events: Facebook and LinkedIn have groups for various industries, locations and interests, which is a great way to find potential clients. Once you’re a member of these groups you’ll be able to access (*in most cases*) the members database and contact individual people. LinkedIn also has an events feature where you can find relevant events for your target audience, and once you’re an attendee you can view all the other attendees.
    - Direct search: Searching directly for your allows you to be very specific with your lead requirements.
      * LinkedIn: LinkedIn has the most in depth search functionality of all platforms which you can use to build detailed lead lists.
      * Instagram: On instagram you’re limited to searching using keywords. If your target audience are “roofing companies” then you can search for (*for example*): “roofing”, “roofing company”, “roofer”, “roofers”.
      * Facebook: Facebook allows you to search directly for pages or companies along with locations.
    - Google search: You can use Google and ChatGPT to find hundreds of leads and contact information such as email addresses and phone numbers by using this method: [How to Get Web Design Clients on Instagram (full guide)](https://youtu.be/4e--urNopKk)

[WAA - Web Design Clients on Instagram](https://docs.google.com/document/d/16VhWVIjsOFgmyrtOPQOdoKXLh_G9E_kHsCX4-xHPids/edit?usp=sharing)

* + Other: Here are other ways to find specific businesses.
    - SAAS Companies: Here you can find platforms that are great for finding SAAS companies ([*Growth List*](https://growthlist.co/)*,* [*Product Hunt*](https://www.producthunt.com/) *etc.*).
    - Ecommerce: Use these sites to find online stores ([*Woocommerce*](https://woocommerce.com/showcase/)*,* [*TechLookup*](https://hunter.io/techlookup)*, etc.*).
    - Platforms: Use these sites to find companies that are actively looking for professionals ([*Contra*](https://contra.com/home)*,* [*Dribbble*](https://dribbble.com/jobs)*,* [*99designs*](https://99designs.qvig.net/patrick)*,* [*Upwork*](https://www.upwork.com/) *etc.*).
  + Tools: There are great lead generation tools you can use such as:
    - [How to Generate 1000s of Web Design Leads Per Day in 2025](https://youtu.be/JedAtYEj9w4)
    - [How To Get FREE Unlimited Web Design Leads With ChatGPT in 2025](https://youtu.be/dEZ81f3w4Js)
    - [Clay](https://clay.com/?via=patrick): The most powerful lead gen & refining tool.
    - [Apify](https://www.apify.com?fpr=kv2vq): A fantastic site with multiple lead scraping tools!
    - [ContactOut](https://contactout.com/): Great for searching for individuals.
    - [Instant Data Scraper](https://chromewebstore.google.com/detail/instant-data-scraper/ofaokhiedipichpaobibbnahnkdoiiah): Free scraping tool (*used in videos mentioned above*).
    - [Hunter](https://hunter.io/): Extract emails from websites.
  + Pro Tips:
    - The more information you can collect the better
    - Use a CRM ([*GHL*](https://www.gohighlevel.com/30-day-trial?fp_ref=patrickspiegel)) or spreadsheet to record data.
    - If you’re using LinkedIn make sure to try out “Sales Navigator” to get more advanced search functionality.
* Scripts & Strategies: It’s time to start reaching out to clients. Whilst you can do generic mass-outreach, I’ll be focusing on 4 personalised strategies to stand out from most web designers.
  + Market Research:
    - What: This strategy focuses on engaging prospects through thoughtful questions about their business. The goal is to uncover their pain points, goals, and needs while subtly positioning yourself as the expert who can help solve their problems.
    - How: 1. Begin by asking open-ended questions about their business operations, challenges, or goals. →

2. Listen carefully to their answers, and use the opportunity to identify areas where your services can add value. → 3. Transition into mentioning how you’ve helped similar businesses address these exact issues, and/or provide free value, and eventually get them on a call.

* + - Pros: Not salesy, low pressure, building genuine connections.
    - Cons: Takes longer to get to your offer.
  + Voice/Video Message:
    - What: This involves recording a short personalised video or voice message to request permission to send a more detailed pitch later. This is a great way to stand out from text-based outreach.
    - How: 1. Record a 15-30 second message mentioning you have something that could help solve [their pain-point]. 1.5. Then mention you don’t want to send it without their permission, and they should reply with a thumbs up if they’d like to hear more. → 2. Send a 2-5 minute pitch video showcasing your offer (*personalised = even better*). Your CTA should be to get them on a call.
    - Pros: Very direct, personalised.
    - Cons: Time-intensive.
  + Loom Strategy 1 & 2:
    - What: Similar to the voice/video strategy, this allows you to be personalised with your outreach by recording a short audit-style video (*audit or add design example*) for our leads. In version 1, we create the video (*& design*) upfront, whereas in version 2, you first tell them that you’ve recorded a video with some ideas etc. and only create the video (*& design*) once they’ve engaged.
    - How: 0.5. For version 2, first send them a message/email saying that you’ve checked out their website and had some ideas to [insert their goal]. Then that you made a video (*& a redesign*) and ask for permission to send it over. → 1. Record a 3-5 minute video analysing their website/funnel and highlight some improvements they could make (*genuine value*), or creating a quick redesign → 1.5. Then show your offer with social or system proof and finally Your CTA should be to get them on a call.
    - Pro Tip: If you’re creating designs as upfront value, you can create a template for your niche and just change the logo, images and text for each new lead.
    - Pros: Hyper personalised, value upfront, high conversion-rate.
    - Cons: Extremely time-intensive (*unless version 2*).
  + Issue Council:
    - What: This strategy involves identifying a problem on a prospects website and presenting it to them with a fix (*if we think something is broken with our business we will want to find out more*).
    - How: 1. Try to find a problem (*example: technical issue, bug, design fault, expired link etc.*) on the website or funnel of a potential client. → 2. Make them aware of this issue by messaging them or sending them a picture (*do this without pitching*). → 3. Once they’ve engaged, offer to help them out and fix the issue, or you can talk about other ideas you had for the website (*your offer and how it can help their business*).
    - Pros: Value upfront, hyper personalised.
    - Cons: Time-intensive, not always applicable.
* Pro Tips: These tips are vital and will make or break your outreach efforts.
  + Just Do it: Seriously, the main thing holding you back from starting outreach is wanting to have the perfect message (*trust me I was the same*), but until you go to the market and get feedback, you won't know if it’s good or not → Just Start!
  + Track Numbers: Use a CRM ([*GHL*](https://www.gohighlevel.com/30-day-trial?fp_ref=patrickspiegel)) or spreadsheet to record contacts, outreach attempts and responses.
  + Follow Up: You NEED to follow up with leads as the majority of appointments aren’t booked on the first outreach attempt (*with: system/social proof, case-studies, free value*)! We look more into this in the 3.1 Booking the Appointment section.
  + Personalisation: Add personalisation by referencing something about their business.
  + Keep It Short: When reaching out to somebody who hasn’t heard your name before, they don’t want to read 3 paragraphs → keep it as short and to the point as possible.
  + Social/System Proof: If you have any testimonials or case-studies make sure to incorporate them in your outreach efforts.
  + Split Test: Test out different scripts to see what differences perform better.
  + Be Consistent: Outreach is mostly a numbers game, so don’t give up if you’ve sent 100 messages and haven’t landed a client yet.

✍ To Do: Select one outreach method and create script strategy (*1-2 hours*) → Build your first lead list of 50 ideal clients (*1-2 hours*) → Outreach to 5 leads on day 1 → increase so you reach out to all 50 in the next 5 days → increase outreach efforts → track and adjust to feedback.

## 2.3 Inbound Funnel

Let’s talk about the most underutilized client acquisition strategy – creating an Inbound Funnel! Instead of spending your time chasing leads, you build systems that draw clients to you by showcasing your expertise and building trust. This approach not only frees up more of your time but also brings in higher-quality leads who are already interested in your services. Since they’re reaching out to you, you don’t have to convince them as much – they’re already warm and more likely to convert.

* Social Media: The vast majority of you use social media like YouTube and Instagram to consume content (*I mean that’s how you found me*), yet only a tiny amount are using it to attract clients. Let’s change that shall we:
  + Why create content: By sharing our expertise, case-studies or just in general building a personal brand as a web designer (*or whatever your services are*), we’re building an authority in our niche. It doesn’t just attract clients, but opens us up to other opportunities such as partnerships, being invited to events and podcasts etc. Additionally it builds authority when reaching out to potential clients or partners.
  + Platforms: Not all platforms work for every niche so focus on those where your target audience spends their time (*as discovered in 1.3.1 Identify Target Audience*).
    - Identify target audience behavior**:** Why are they on the platform? Business-focused audiences might be on LinkedIn, while visually-driven brands may frequent Instagram or Pinterest.
    - Pick two platforms to focus on**:** Whilst you can still post to multiple platforms, focus on 2 where you actively engage with your target audience (*be seen*) or with other creators to possibly collaborate (*creates partnerships*).
    - Leverage platform-specific features**:** Use features such as Instagram stories, LinkedIn articles or featured posts to share your expertise in unique and engaging ways.
    - Platforms: Instagram, LinkedIn, Pinterest, Twitter, TikTok, Youtube, Facebook, Behance, Dribbble.
  + Profile: Your profile is often the first thing potential clients see so make it count by clearly communicating your value. I would recommend making your profile personal, even if you're presenting yourself as an agency.
    - Picture: A picture of yourself will help build trust → Regardless if you’re a “freelancer” or “agency” (*a logo will leave the audience thinking: “what are they hiding?”*).
    - Username & Name: Your username can be your agency name or freelance name, but your name should be your real name (*+ business name if agency*) - keep it short.
      * Example: “@xyzstudios”, “Patrick | XYZ Studios”
    - 3-Point-Offer Bio: Summarize what you do; Guarantee or social proof; a CTA (*value based = even better*).
      * Example: “Helping healthcare professionals get more patients; Get more appointments or you don’t pay; Free training or consultation call (*if link below, or “DM for..”*).
    - Highlight key achievements**:** Use LinkedIn’s featured section or Instagram’s story highlights to showcase case studies, testimonials, or completed projects.
    - Extras**:** If applicable, invest in tools like LinkedIn Premium or verification to build trust and credibility.
    - Pro Tips:
      * Don’t focus on the amount of followers you have → as long as you create the right content and reach the right audience you’ll be on the right track.
      * Don’t create multiple accounts per platform (*agency + personal*) → focus on one!
  + Content: In order to build trust with our ideal clients, we need to create content that establishes us as experts, resonates with our target audience, and helps us build a strong and lasting brand.
    - What to Post: Focus on the “why” - not the “how”. Your ideal clients need to understand why your services are important to their business.
    - Content Types: Social Proof (*Case Studies, Testimonials*), System Proof (*Showing the Strategy*), Designs, Expertise (*How to’s*), Personality. We’ll look at more examples in 2.5 Paid Ads.
    - TOFU (50%): Awareness (*why is it important*).
      * “Why your website is losing you money”.
    - MOFU (30%): Consideration (*How to*).
      * “How to get more [industry] clients without spending money on ads”.
    - BOFU (20%): Decision (*Case studies, social proof*).
      * “How we helped this client [achieve result]”.
    - Pro Tips:
      * You don’t need to reinvent the wheel or go viral, but make your content unique in some way.
      * Don’t be perfect → you just need to start.
      * Make use of platform specific “algorithm hacks” such as LinkedIn and Instagram “comment this word” method to boost engagement.
      * Find 5 accounts and select their top 5 performing posts → create your own versions and make them unique to you  
        (*Do Not Copy*).
    - Tools:
      * Screen Recorder: 1. [Monthly](https://tella.tv/?via=patrick-spiegel) 2. [One-time](https://screen.studio/@j6728)
      * Editing: [CapCut](https://capcutaffiliateprogram.pxf.io/ZQPEWK)
    - Example: [How to Get Web Design Clients with NO Outreach! (New Strategy)](https://youtu.be/DmDrRjRg_e4)
  + Turning Views into Leads: Now that you have the views, we need to convert them into clients. Let’s take a look at different methods we can use to get them interested in reaching out.
    - Lead with Value: To get somebody who doesn’t know us to reach out, we need to offer them free value → this will build trust → then continue to nurture them → book an appointment (*sometimes they’ll book a call without needing the previous steps*).
    - What to Offer: Offer lead magnets like written or video guides (*VSL*), free consultations or even case-studies (*genuine value*).
    - Get them Engaged: Use comments & DMs ([*Manychat*](https://manychat.partnerlinks.io/patrick)), or CTAs in your posts and bio.
    - Engage & follow up: Use stories to boost interaction with you directly (*show BTS to build trust*).
    - Build a funnel (*important*): Add leads to an email campaign or CRM where you can share helpful tips, showcase case studies, and build credibility over time.
  + Pro Tips:
    - Content is not a short-term strategy, so don’t get discouraged if you don’t see leads flooding in after 2 weeks → You Need To Stay Consistent! (*But make sure that you’re consistently improving as well* 😉).
    - Don’t try and post every day when you’re starting out → set a goal of 1 post in your first week → then 3 and so on.
    - Being on camera will definitely help build trust but it isn’t necessary. If you’re nervous about recording yourself, do some practise videos (*record but don’t upload them*).
* SEO Strategy: SEO is a powerful long-term strategy for building inbound leads and ensures potential clients can find you when searching for relevant services.
  + Your Website:
    - Make sure your website is SEO-optimised.
    - Include additional service pages.
    - Write blogs that answer questions your target clients are searching for (*you can turn these into content for other platforms*).
  + Guest Blogging: Publish articles on other platforms like Medium, LinkedIn or industry-specific websites that link back to your website.
  + Google My Business: Optimise your GMB page and ask your clients to leave reviews there (*you can use virtual offices to register your business in cities without needing an actual office*).
* Platforms: Being on freelancing platforms like [Upwork](https://www.upwork.com/), [99designs](https://99designs.co.uk/) and [Contra](https://contra.com/via?u=patrick_spiegel1) can provide another stream of inbound leads, especially if you're just starting out or looking to expand your client base.
  + Why Use Platforms?:These platforms already have active users searching for web design services, which means you don’t need to generate demand. Instead, you focus on standing out and proving your expertise.
  + How to Stand Out**:** 
    - Optimize Your Profile**:** Highlight your skills, and include a portfolio of your best work.
    - Niche Expertise**:** Just like everywhere else specialising in a niche will help you stand out (*especially if it’s a tool or key deliverable*).
    - Leverage Reviews**:** Deliver great work and encourage clients to leave reviews to boost your credibility.
  + Pro Tips**:**
    - Start with competitive pricing to build reviews, then increase your rates as your reputation grows.
    - Apply to projects daily and tailor your proposals to show you understand the client’s needs!
* Events & Webinars: Engaging in events and webinars that are related to your niche/target audience is a great way to build credibility and genuine connections.
  + Host Your Own Webinars**:** Choose topics that resonate with your target audience, such as “How to get more clients as a local business without spending money on ads”, and offer an exclusive offer to generate leads.
  + Collaborate on Events**:** Present a seminar by yourself or partner with other professionals to co-host a presentation at industry events, conferences or trade shows.
  + Pro Tip**:** Record webinars and share them as gated content on your website or social media to keep generating leads long after the event is over.

✍ To Do: Choose 2 platforms for content & optimise profiles (*2 hours*) → Post your first post (*2 days*) → Plan & create next 5 posts (*1-2 week*) + continue to post regularly → Set-up Google My Business (*1 hour*) → Post your first blog on website & guest platform (*1 week*).

## 2.4 Partnerships

Building partnerships is one of the most efficient ways to grow your web design business. By collaborating with complementary service providers or tapping into existing networks, you can reach a wider audience, gain consistent referrals, and establish yourself as a trusted expert in your field.

* Why Partnerships Work: Partnerships allow you to leverage the trust and credibility another business or professional has already built with their audience. This can fast-track client acquisition and create ongoing opportunities for growth.
* What Makes a Good Partnership: A good partnership is built on complementary services, a shared target audience, and a clear value exchange that benefits both parties and the client. This can include a commission exchange where one partner receives a percentage or flat fee for referring clients to the other, creating a mutually beneficial incentive to collaborate. (*Example: If a web designer partners with a marketing agency, the ads of the marketing agency will perform better as the targeted website/landing page will have a higher conversion-rate.*)
* Types of Partnerships to Consider:

1. Marketing Agencies**:** Marketing agencies often require web designers to handle client projects. By partnering, agencies can expand their service offerings, and you gain a reliable stream of projects. For example, you could design SEO-optimized or lead-generating landing pagers to enhance their marketing efforts. This partnership creates a win-win, as they deliver better results for their clients, and you build a consistent workload.
2. Freelancers in Related Fields**:** Collaborate with professionals like copywriters, SEO experts, graphic designers, and photographers. These freelancers can refer clients needing web design, and you can recommend their services in return. For instance, a copywriter working on a rebranding project might recommend you to redesign the client’s website, while you refer clients who need compelling copy or SEO expertise.
3. Local Business Groups and Organizations**:** Joining chambers of commerce or local business groups connects you with active business owners. You could host a free webinar or workshop on topics like “Building an Optimized Website for Small Businesses” to showcase your expertise. Such partnerships not only position you as a trusted resource but also create direct connections with potential clients who value your insights.
4. Platform-Specific Opportunities**:** Partnering with SaaS providers, CMS platforms, or e-commerce tools like Shopify or Webflow can elevate your credibility. These platforms often offer partner programs that give you a badge or certification, boosting your perceived trust and professionalism. As a certified partner, you could become a recommended expert, driving consistent leads to your business.

* How to Build Partnerships:

1. Identify Potential Partners**:** Start by analyzing your target audience and the services they frequently need before, during, or after working with you.
2. Research and Qualify Leads**:** Narrow down your list by researching each potential partner. Assess their reputation, target audience alignment, and willingness to collaborate.
3. Reach Out Strategically**:** Craft personalized messages that focus on mutual benefits. Highlight how your collaboration can solve their pain points or improve their offerings.
4. Showcase Your Value**:** Share relevant examples of your work that demonstrate how your services align with their needs. You could present case studies or a portfolio that highlights successful collaborations, such as websites optimized for SEO or e-commerce projects that drove conversions.
5. Propose a Trial Collaboration**:** Offer to start small by collaborating on a trial project, referral exchange, or discounted first engagement. This builds trust and helps both parties gauge the value of the partnership without committing long-term initially.
6. Define Terms and Set Expectations**:** Once trust is established, outline the partnership’s structure, including:
   * How referrals will work (e.g., a commission-based system).
   * What services you’ll provide for their clients and vice versa.
   * Clear communication channels and workflows to avoid misunderstandings.
7. Build a Mutually Beneficial System**:** Ensure the partnership benefits both parties equally. For example, offer a commission for referrals, co-host events or webinars, or bundle services for mutual clients.
8. Maintain and Nurture the Relationship**:** Regularly check in with your partners to exchange feedback and refine your collaboration.

✍ To Do: Research potential partners in your niche & create a list of 10 (*2 hours*) → craft a compelling partnership pitch (*1-2 hours*) → Reach out to three potential partners this month.

## 2.5 Paid Ads

Paid advertising can be a game-changer for scaling your web design business. Unlike organic methods, ads allow you to target your ideal clients directly, generate quick results, and control the volume of leads coming in. However it requires a clear strategy, consistent optimization and the available funds to invest.

* Who Should Use Paid Ads: Paid ads are great for automating lead generation but might not be the right fit for every stage of business. Let’s determine if ads are the right next step for you.
  + Established Foundations: Ads work best when your business has a clear niche and defined services. Having a polished portfolio, client testimonials, and a proven track record to showcase, can dramatically help your ads performance.
  + Consistent Revenue Stream: If your business is generating consistent income and you have some budget to invest, ads can help you scale. For those starting with limited resources, it may be better to focus on organic strategies first.
  + Clear Systems in Place: Ensure you have a solid system for handling inquiries, onboarding clients, and delivering services. Ads can quickly generate leads, so be prepared to manage the influx.
  + Scaling Beyond Organic Growth: If you’ve already seen success through organic methods like social media or referrals but are hitting a ceiling, ads can help you reach new audiences and expand your client base.
  + Know your Customer: Having a clear customer avatar can enhance your ads performance significantly which is why completing the 1.3 Market Research module is super important for precision targeting.
* Platforms: Not all ad platforms are created equal. Here’s an overview of the most effective platforms for web designers:
  + Facebook & Instagram Ads:
    - Ideal for showcasing visual projects like case studies, designs, or testimonials.
    - Use targeting options to reach business owners, startups, or specific industries.
    - Leverage retargeting to re-engage website visitors or social media followers!
  + LinkedIn Ads:
    - Great for B2B web design clients, especially high-ticket services.
    - Target decision-makers by job title, industry, and company size.
    - Promote lead magnets like free consultations or guides for better conversion rates.
  + Google Ads:
    - Best for targeting users actively searching for web design services.
    - Focus on local or niche-specific targeting by using specific keywords to reduce costs and improve lead quality.
  + YouTube Ads:
    - Perfect for demonstrating expertise and building trust through video.
    - Retarget viewers who have engaged with your channel or website.
* Creating Effective Ads: To create ads that resonate with your target audience, you need to meet potential clients where they are in their journey. This requires understanding the Stages of Awareness, which help determine what kind of messaging will capture attention and drive action. This can also be applied to organic content. Let’s break it down:

1. Unaware: The potential client doesn’t even realize they have a problem or need a solution.
   * Goal of Your Ad: Capture attention by sparking curiosity or highlighting an issue they might not have considered. Educate and create awareness of the problem, which is a great way to add them to your funnel.
   * Examples:
     + *“Your website might be costing you clients—and here’s why you don’t even realize it.”*
     + *“Are your competitors taking your clients without you even knowing about it? Find out now!”*
     + Ad creative: Use a thought-provoking image, stat, or question to grab attention and encourage clicks.
   * Call to Action (*CTA*): Offer a free resource or quiz that subtly introduces the problem (*e.g., “Take our free website health check to uncover hidden issues”*).
2. Problem Aware: The potential client knows they have a problem but hasn’t yet identified the solution.
   * Goal of Your Ad: Highlight the problem and demonstrate your understanding of their pain points.
   * Examples:
     + *“Struggling to get new customers from your website?”*
     + *“Why most websites fail to convert visitors into leads—and how to fix it.”*
     + *Ad creative: Showcase a “before” scenario with data or visuals that emphasize the consequences of ignoring the issue.*
   * Call to Action (*CTA*): Offer a free resource or consultation to explore their challenges further (*e.g., “Download our free guide on why your website isn’t converting”*).
3. Solution Aware: The potential client understands their problem and knows a solution exists. They’re evaluating different options, including your service, but need clarity on why you’re the best choice.
   * Goal of Your Ad: Educate your audience on the unique value you provide, address potential objections, and build trust. Focus on benefits, results, and social proof to establish credibility and differentiate yourself.
   * Examples:
     + *“Looking for a website that delivers real results? Here’s why businesses choose us to boost conversions.”*
     + *“Ready to revamp your site? Discover how our proven strategy helped [client type] increase leads by 40%.”*
     + *Ad creative: Use testimonials, client success stories, or comparison visuals showing your edge over competitors.*
   * Call to Action (*CTA*): Encourage them to book a call or look at your past results (*e.g., “Schedule a free strategy call to see how we can help” or “Download our case study to learn how we helped businesses like yours achieve [result]”*).

* Pro Tips**:**
  + Having a Clear Offer: Ensure your ads clearly communicate the problem you solve and why your services are valuable.
  + Test & Optimise: Always run A/B tests on headlines, copy and visuals, and monitor performance metrics like CTR, CPC and conversion rates.
  + Targeting: Most conversions don’t happen on the first interaction. Use retargeting to stay top-of-mind (*with tools like a “Pixel”*). Also use lookalike audiences based on past clients or email lists to get better results.
  + Don’t Overspend: Start small, analyze data, and scale only once you’ve found a winning formula.
  + Benchmark: Compare your results against industry standards to identify where your campaign could need improvements.
  + Example Ads: Use tools like “[Facebook Library](https://www.facebook.com/ads/library/)”, “[Adfolio](https://www.adfolio.design/)” or “[Foreplay](https://foreplay.co/?via=patrick-spiegel)” to find example ads. In addition you should save ads you come across online.
  + Landing Pages: Consider creating dedicated landing pages for each campaign to maximize conversions.
  + Common terms: CPC (*Cost Per Click*), CTR (*Click Through Rate*), CPM (*Cost Per Thousand Impressions*), CPL (*Cost Per Lead*), ROAS (*Return On Ad Spend*), CPA (*Cost Per Acquisition*).

✍ To Do: Decide on a platform (*1 hour*) → Define your target audience and craft ad messaging based on awareness stages (*2-3 hours*) → Create ad creatives and landing page (*4-5 hours*) → Launch your first campaign with a small budget (*1 hour setup*) → Monitor and optimize performance weekly (*1-2 hours per week*).

# Closing the Client

Now that we have taken our offer to market, whether that was through content, cold outreach, partnerships or other methods, we are almost ready to close some clients. Some of the leads will already have booked an appointment with us, whilst others will need some nurturing. This section will focus on bridging that gap, starting with strategies to book the appointment, and then moving on to mastering the sales call process to close deals effectively.

* Booking The Call: Most of the selling will be done via a sales call, which is the most effective way to close clients. Before diving into lead generation strategies, let’s first ensure your booking process is seamless and effective.
  + Tools: [Cal.com](https://refer.cal.com/patrickspiegel)
  + Questions: Having questions can you pre-qualify leads.
    - Basic: Name, Business Name, Website URL (*if applicable*).
    - Contact: Email, Phone Number.
    - Additional Notes: Allow them to add anything relevant.
    - Optional: These are some optional questions you can add.
      * **Business Type & Industry:** Helps you understand their niche.
      * **Current Challenges:** Ask, “What problems are you hoping to solve by working with us?”
      * **Goals & Desired Outcomes:** “What are you hoping to achieve in the next 6-12 months?”
  + Reminders: Just because a lead booked in a call with you doesn’t mean they are going to show up. Make sure to collect their phone number and email address on your call booking page. Then automate reminders (for *1 day, 1 hour, 15 minutes in before the call*) that can include some value or case study/testimonial to further build excitement and trust.

## 3.1 Booking the Appointment

If our leads haven’t booked a call with us yet, it doesn’t mean they’re uninterested. Sometimes they just need a little more nurturing or motivation to take the next step. Let’s take a look at 3 methods to bridge that gap which will depend on where in the funnel that lead is.

* Follow Ups: This approach is perfect for leads you’ve directly reached out to through cold outreach or DMs (*we briefly touched on this in the outreach section*). Often, people don’t respond immediately—not because they’re uninterested but because they’re busy.
  + Why Follow-Ups Work: Following up with leads shows persistence and when done correctly can show you actually care about them.
  + How to Follow Up: Do not be one of those annoying people who either is rude or just sends “hey”. Instead:
    - Send value driven messages, such as sharing a case study, quick tips or a free resource.
    - Stand out by sending them a short video or voice message.
    - React to some news or updates that happened in their business or industry.
    - Use a mix of communication channels like DMs, emails or even a phone call, depending on what contact information you have.
  + Pro Tip: Follow up 7 times or until the lead specifically says “No”. (*Yes, 7 times!*), and space out the follow ups (*e.g., 1 day, 2 days, 2 days, 5 days, 1 week, 1 month*)
* Email Campaign: For leads who’ve opted into your lead magnets (e.g., guides, VSLs, or free consultations), email nurture campaigns are a powerful way to build trust and guide them to book a call.
  + Why Email Campaigns Work: Regular, value-packed emails keep you top-of-mind and position you as an expert, and still have the highest conversion rates in the industry.
  + What to Include in Your Campaign:
    - Educational Content: Give out genuinely valuable advice that your audience can implement to improve their business (*should be related to your service of course*).
    - Social Proof: Highlight client success stories or testimonials to build credibility.
    - Clear CTA**s**: Your emails should encourage them to book a call (*e.g., “Click here to schedule your free strategy session”*).
  + Pro Tip: Use platforms like [ConvertKit](https://partners.kit.com/icr8takslsvu) to automate email sequences, track engagement and design professional looking emails.
* Groups: Creating private groups on platforms like Facebook, LinkedIn, or [Skool](https://www.skool.com/signup?ref=e98fb44ee8f5481389f6593b4a710a16) allows you to nurture leads and position yourself as an authority in your niche, whilst also connecting like-minded businesses with each other.
  + Why Groups Work: They create a sense of community and exclusivity, where potential clients feel they’re learning directly from an expert.
  + How to Leverage Groups: (*Make sure you use a platform where the majority of your leads are active*).
    - Share consistent, value-packed content like tutorials, live Q&A sessions/webinars, or industry updates.
    - Engage with members by answering questions and encouraging discussions.
    - Occasionally share CTAs to book a call, especially after delivering high-value content.
  + Pro Tip: Use pinned posts or announcements to direct members to book a consultation or download additional resources.

✍ To Do: Create your follow-up strategy/messages (*2 hour*) → Create a 3-5 email nurture sequence (*2-3 hours*) → Set up your private group and invite leads (*2-4 hours*).

## 3.2 Sales Calls

Now that we’ve booked the appointment, it’s time to uncover the potential clients’ needs, understand their challenges, and determine if our services are the right fit. This is where we position ourselves as an expert, build trust and showcase how we can deliver results for their business. We’ll be using the 2 Call Close framework which is a time-efficient structure to understand the clients needs and create a tailored solution (*depending on your service-type and experience level you can also combine this into a 1 Call Close*).

* Call 1 (The Discovery Call): The goal of the discovery call is to build rapport, understand the client’s pain points, and assess whether our services are a good fit (*around 15 minutes*). It’s not about pitching—it’s about listening and diagnosing their problems.
  + Structure:

1. Establish Rapport**:** Start with casual, friendly conversation to build a connection (*keep this under 2 minutes*). Then briefly reintroduce yourself focusing on what you do and how you help businesses like theirs.
2. Set Expectations**:** Explain the purpose of the call (*to understand their needs and determine if you’re a good fit to help*).
3. Ask Questions**:** Other than understanding more about their business (*such as Who, How, What, How Much*), there are 3 main pieces of information you want to know (*build emotional connection*).
   * Goals: What do they hope to achieve, their timeline and why is this important to them.
   * Problems: Why are they not achieving the goal now, and what pain points are they experiencing.
   * Impact: What happens if they don’t achieve their goals.
4. Pitch Call 2: Thank them for their time and explain that you’ll use the information to research and create a customised strategy.
5. Book Call 2: After getting a verbal agreement, you’ll book in the second call whilst you’re still on the first call. Get them to confirm the call before you leave.
6. Bonus: Create a short questionnaire with questions about their business, competitors and any additional information they’d like you to consider (*such as design references*).
   * Pro Tips:
     + They should be doing the majority of the talking.
     + Record the call with tools like [TLDV](https://tldv.cello.so/af5TAp9mSQe) to analyse after (*make sure to ask for permission before hand*).

* Call 2 (The Strategy Call): This call is where we present our solution, handle any objections and close the deal (*around 30 minutes*). Before going on the second call, you will want to research successful competitors and see what makes them succeed online (*if you haven’t already done so in the 1.3 Market Research section*) and adjust your proposal accordingly to your client.
  + Structure:

1. Recap Call 1: After establishing basic rapport, we’ll want to recap the three main information pieces (*Goals, Problems & Impact*).
2. Present Research: Share the research you’ve done on their competitors, highlighting what sets them apart and contributes to their success (*this will show the client you’ve put a lot of time and effort into understanding their business*). You can do this separately or add this to your proposal so everything is in one place.
3. Present Strategy & Proposal: Here you’ll present your unique strategy (*That you created in 1.6 SOP & Proposal* and *make sure to position your services as the bridge between their current challenges and desired outcomes*) where you show clear deliverables and timeline. Before you show them the price, ask if they have any questions, and then ask “Other than the price, is there any reason you wouldn’t want to go forward with this?” (*now the only valid objection they could have is the price*).
4. Objections: The client might have some objections which is where you would want to create a list of possible objections and how to handle them.
5. Get Paid: To close the client you will want to get paid on the call (*so have a stripe invoice ready*). Ideally the client will sign a basic contract/proposal before payment is complete to ensure everything is legally binding. Depending on the service/package you’re proving you’ll want to get a deposit before you start working (*25% or 50%*).
   * Pro Tips:
     + Use tools like [Bonsai](https://www.hellobonsai.com/?fp_ref=patrickspiegel) for Proposals, Contracts, Invoices & more.
     + Focus on Value and how your services solve their problems rather than listing features.
     + Focus on their goals and use their own words to emphasize how your solution fits.
     + Build urgency by highlighting the risks of not taking action.
     + Be confident and assume the sale—don’t leave the decision open-ended.
     + Record the call with tools like [TLDV](https://tldv.cello.so/af5TAp9mSQe) to analyse after (*bring it to your* [*mentor*](https://www.skool.com/webagencyaccelerator) *to get feedback*).

✍ To Do: Create the list of questions for your discovery call (*1 hour*) → create a rough script for the strategy call (*2 hours*) → practise both calls several times → if you haven’t done so yet, set up templates for proposals, contracts and payments (*2-4 hours*).

* What’s Next?
  + Congrats: If you’ve signed a client, celebrate the win and move on to onboarding them smoothly which we will go over in the next section.
  + Didn’t Close the Deal: Don’t lose heart—follow up with a thank-you email, and offer to stay connected through your email list or social platforms for future opportunities. Sometimes, the timing just isn’t right, and nurturing the relationship can lead to a deal later (*nurture with value, testimonials and case studies*).

# Service Delivery

Now that you’ve closed the deal (*WoopWoop!!*), it’s time to deliver on your promises. This phase begins with a smooth onboarding process to set expectations, followed by delivering your services. Managing client relationships throughout the project is important to keeping them confident in you and your services. With everything you’ve set up so far, from crafting your offer to closing the deal, you’re now ready to deliver some awesome results and make your clients happy that they chose you!

## 4.1 Onboarding

A smooth onboarding process is the foundation of a successful client relationship. It sets the tone for the project, aligns expectations, and ensures all necessary information and assets are gathered. Regardless of the tools you use, the goal remains the same: to make the client feel supported, informed, and confident in the process.

* Tools & Software: Before we look at how we onboard our clients, we’ll need to decide what tools we use to do so, which will depend on personal preferences and available funds.
  + [Hello Bonsai](https://www.hellobonsai.com/?fp_ref=patrickspiegel) (*most established*), [GoHighLevel](https://www.gohighlevel.com/30-day-trial?fp_ref=patrickspiegel) (*automations + general business*), [Notion](https://affiliate.notion.so/2y51k6ve8onh) (*free*), [Client Manager](https://www.clientmanager.io/) (*new + 40% Off in* [*WAA*](https://www.skool.com/webagencyaccelerator)).
* Process:

1. Client Portal: Once you’ve chosen your client onboarding/management tool you’ll want to set up your project and client portal which is where you’ll collect all the information and keep track of progress along with sharing updates with your client.
2. Contract & Payment: Before you begin with the project, you’ll want to ensure the client signed the contract/proposal and made the initial payment.
3. Communication: Make sure that your communication channels are set up (*what you’ll be using to stay in touch with your client*), whether that be via slack, whatsapp/messenger group, client portal or simply via email.
4. Welcome Email: Send a warm welcome message that includes a brief overview of the project timeline, how you’ll stay in touch for the duration of the project and the next steps (*if you’re using a client portal add a video to show them how to use it*).
5. Onboarding Form: Create an onboarding form (*questionnaire*) with your chosen tool to gather important information about your client. This information will depend on what service you’re providing and what type of business the client is running, but questions can include: “Why does your business exist? What is the story behind your business and the core values that drive you?”, “Do you have a mission statement or tagline; What's your key message?”, “Who is your target audience and what problems are they facing?” “Frequently Asked Questions that your customers ask.” - Just make sure you collect all the information you’ll need to complete the project.
6. Kickoff Call: Schedule an onboarding meeting with your client to briefly go over the onboarding form (*a great chance to ask any additional questions*), explain how the rest of the service delivery process will continue, and what they can expect in the coming days/weeks.
7. Onboarded: At this stage the client should have clear expectations of the project timeline, when they’ll be receiving updates and how you’ll be staying in touch with them.

* Pro Tip: Be prompt and professional as this will make clients feel more taken care of and therefore more valued, but make sure to set boundaries when it comes to communication in order to avoid unnecessary stress (*such as not on weekends*).

✍ To Do: Choose your client management tool (*1 hour*) → Setup the tool & client portal (*2 hours*)→ Create templates for your welcome email & onboarding form (*2 hours*).

## 4.2 Service Fulfilment

The entire journey, from laying solid foundations and mastering client acquisition to seamlessly onboarding clients, has been building toward this moment: delivering exceptional value to the clients we set out to serve. Regardless of your service type (web design, development, SEO, etc.), a structured approach ensures consistent, high-quality outcomes. This section builds on the internal strategy or SOP developed earlier, offering a universal framework for efficient service delivery.

* Process: This will depend on your exact deliverables, but here’s an example structure you can follow (*you’ll have already done some of these in 1.3 Market Research, 1.6 SOP/Proposal & 4.1 Onboarding, but this will help you understand how they fit into the project timeline*).

1. Define Project Scope & Deliverables:
   * Review Onboarding Checklist: Ensure the contract, deposit, onboarding form & call have been completed along with setting up the client management tool (*such as client portal or communication channels*).
   * Reconfirm Scope: Reestablish and confirm that the client’s goals, timeline and deliverables are aligned with the project milestones discussed during onboarding.
2. Benchmark:
   * Establish Baseline: Before starting the project, track and document relevant data to measure the impact of your work which could include SEO metrics, Conversion rates or any key performance indicators (*ask the client for any data if you can’t collect them yourself*).
3. Research & Planning:
   * Market Research: If not fully covered during onboarding, refine your understanding of the client’s competitors, target audience, and industry trends (*refer back to 1.3 Market Research and 1.6 SOP/Proposal*).
   * Asset Review: Assess all materials provided by the client, such as brand guidelines, existing websites, or market data (*as received in 4.1 Onboarding*).
   * Internal Planning: Create an internal project database with all assets, documentation (*provided by the client*) and research done by you. Finally map out the project workflow, assigning tasks to team members or freelancers if outsourcing is involved.
4. Concept & Strategy Development:
   * Draft Deliverables**:** Begin working on initial drafts (e.g., wireframes for design, campaign outlines for marketing).
   * Client Feedback: Once the initial draft has been completed, request feedback from the client, and once approved proceed to the next stages of fulfilment.
   * Guarantee: If one of your guarantees is “100% money back”, then this would be the point where if the client isn’t satisfied with the initial draft, you can refund them their deposit.
5. Implementation & Execution:
   * Execution: Follow your SOPs or strategy for your services and execute with nothing but the highest quality, ensuring it meets the required standards (*incorporate regular quality assurance checks especially when outsourcing*).
   * Updates: Keep the client updated on predefined/key milestones ensuring they are informed but not overwhelmed (*share loom videos rather than having calls to could save time*). Depending on the size of the project updates could be shared every 2 to 5-10 days.
6. Client Review & Feedback:
   * Feedback: Present drafts or milestones (*e.g., Figma files, Google docs or live previews*) only when they are ready for review which minimises confusion and premature feedback.
   * Iterate & Refine: Once feedback has been received, address it promptly while sticking to the scope to avoid scope creep (*make sure to clarify any unclear input*).
7. Final Deliverables & Handoff:
   * Testing: Perform thorough checks to confirm everything is functioning correctly.
   * Deliverables: Prepare all required assets, documentation and tutorials ensuring the client knows how to use or manage deliverables independently.
   * Launch: Present the website to the client (*on a call*) and ensure they are satisfied. Make sure to ask for a testimonial (*they can do this whilst on the call*) and a review via one of your chosen platforms. Senja
8. Post-Launch Support: Providing value after the project helps build long-term relationships.
   * SupportWindow**:** Offer a defined period (e.g., 7 days) for free revisions or minor fixes.
   * UpsellOpportunities**:** Introduce the client to ongoing services like maintenance, SEO, or content creation.
   * Gift: Sending the client a gift after completing the project can be a great personal touch to end their experience with you (*this could be a dinner voucher, hand-written thank you letter, or anything related to something you and the client talked about*).
   * Referral: After your support window (*1 - 2 weeks after project completion*) you’ll also want to send the client a check-in email making sure everything is working well. This is a great opportunity to ask them if they would know anybody who could benefit from your services, as a happy client is often the best advocate for your business (*referral*).
   * Benchmark Comparison: After enough time has passed, revisit the data you collected before the project began (*the conversion rates, SEO metrics etc. that the client had prior to working with you*) and compare them. Hopefully having improved those metrics, present them to the client and create a detailed case study for your website.

✍ To Do: Depending on your services create templates and a structure you can follow every project (*this will be heavily dependant on your workflow so no guide time here*).

## 4.3 Outsourcing

Outsourcing is an essential strategy for businesses looking to scale operations, manage workload effectively, or bring specialized expertise to a project.

* What to Outsource: You can start by outsourcing time-consuming tasks (*research, admin work etc.*), then key service work (*design, development, seo etc.*) and finally the management aspect of the business such as hiring a project manager.
* Where to Find Talent: Finding talent can be difficult but here are a couple different places you can do so.
  + Groups: Use groups such as [WAA free](https://www.skool.com/webagencyaccelerator-free), or facebook groups and create a post that you’re looking for XYZ.
  + Platforms: Use trusted sites such as [Upwork](https://www.upwork.com/), [Contra](https://contra.com/via?u=patrick_spiegel1), [Legiit](https://legiit.com/), [Fiverr](https://go.fiverr.com/visit/?bta=983260&brand=fiverrmarketplace) ([FiverrPRO](https://go.fiverr.com/visit/?bta=983260&brand=fp)).
  + Socials: Use Instagram, Linkedin etc. to search for freelancers or once you’ve built a brand you can create a hiring post.
* Best Practises:
  + Roles & Expectations: Provide detailed briefs (*create SOPs for each service*) outlining scope, deliverables, deadlines and expected quality standards (*with examples*), and make sure to have a contract.
  + Trial: Before you begin working on a client project, test out different freelancers on a trial/mock task to evaluate their skills.
  + Tools: Invite them into the same client management tool to make managing projects and feedback easier.
  + Build Relationships: Once you’ve found the right professionals, develop long-term partnerships to keep quality consistent and build a strong team.

✍ To Do: Identify tasks to outsource (*30 minutes*) → Draft SOPs/templates (*3-5 hours*) → Search for talent (*3 hours/ongoing*).

# What’s Next

Get 1 on 1 Help from Myself and other Agency Owners for ANY questions you have!

* FREE GHL, Onboarding Call, Group Calls and more.

👉 Join the [Web Agency Accelerator](https://www.skool.com/webagencyaccelerator)

# Tools & Software

Here are all the tools, software and platforms you need to run a successful web design business.

## 5.1 Business Management

## 5.2 Lead Generation

## 5.3 Design & Development