HOW TO GET CLIENTS ON DAY 1

1.)quora

2.) pinterest

WEBSITE BUILDERS

1.) wordpress

2.) \*\*\*webflow\*\*\*

3.) woo commerce

4.) shopify

5.) php

6.) strapi

7.) gatsby

8.) astro

SERVICERS THAT YOU CAN OFFER

MONTHLY WEB AND MARKETING SERVICES

1.) web design and development- Building websites and web apps of all kinds. You can specialize in specific types of websites(niche down), or just offer general services.

2.) graphic design- If you are good with design, you can offer desiugn services like flyers, infographics, logos, etc.

3.) seo- in addition to basic search engine optimization when you build a website, you may want to ad seo as an ongoing service.

4.) content writing- Offer blog and article writing services. This is great to use as an add on for monthly income

5.) social media management- help individuals and businesses run and manage their social media accounts, including setting them up, branding, networking, popsting, etc.

6.) ad management- Help them set up ads on google, facebook, etc. This includes setup and targeting.

7.) web hosting- Re-sell web hosting for a profit. Use a company like hostinger, bluehost or hostgator to create your own web hosting packages

8.) email marketing- setup email marketing campaigns for your clients.

9.) Branding and rebranding

10.) Business Consulting

11.) photographt and video

12.) public relations

13.) for\_\_\_\_\_\_\_\_\_\_(example:realtors)(niche)

14.) \_\_\_\_\_\_\_\_\_\_ consulting(same idea as 13)

BUSINESS CHECKLIST

1.) Create a business name.(uspto.gov)

2.) Choose a business structure

3.) Create a Business plan

4.) Business Bank Account

5.) Hire an Accountant(not crucial)

6.) Hire a Lawyer(not crucial)

CHOOSING A BUSINESS STRUCTURE

1.) DBA/Sole Proprietorship

A.) Doing Business as

B.) Good for single owner

C.)Easiest to setup

D.) Not an actual legal entity

E.) no personal liability protection

2.) LLC (Limited Liability Company)

A.) Protects from personal liability'

B.) Good for solo or teams

C.) Ongoing filings & fees

D.) not recofnized globally

E.) can not go public

3.) S-Corp

A.) Protects from personal liability

B.) good for solo or teams

C.) minimize taxes

D.) ongoing filing & fees

E.) recognized globally

F.) can go public

PORTFOLIO WEBSITE

1.) Main goal- GET CLIENTS

2.) How can you help their business-- a clear benefit heading

A.) more leads

B.) more sales

C.) help them grow

D.) streamline operations

E.) maximaize potential

3.) Why the customer should work with you.

A.) Client testimonial, reviews and case studies.

4.) What you have done.

A.) Examples of past work.

5.) Where to contact you.

A.) Clear call to action.

I.) Hire us

II.) Work with us

III.) Get a quote

IV.) Schedule a free call

V.) Free website analysis report

VI.) Attend my free webinar

VII.) Get my eBook for free

VIII.) Bring out the best in your team

IX.) Get started free

X.) Learn to code, design, and more-- all on your own time

Try it free fro 7 days, then $25 a month

------------------------------------------ --------------------

| Enter Email Address | | Join Now |

------------------------------------------ --------------------

XI.) Tame your work, organize your life

Remember everything and tackle every project with your notes, tasks, and schedule all in one place.

--------------------

| Sign Up For Free |

--------------------

COMMON CTA MISTAKES

`1.) Doesn't exist

2.) Too vague

3.) Too much content and clutter

4.) Too many cta's

5.) bad positioning

QUOTES TO ADD TO PAGE

1.) "I help \_\_\_\_\_\_\_\_\_ owners get more business."

2.) "Your mobile website is costing you sales. Let me help you fix it."

3.) "Focus on running your business, while I focus on growng your business."

OTHER WAYS TO GET EXPERIENCE/PROJECTS TO PUT ON WEBSITE

NEED AT LEAST 2 PROJECTS

USE NANCYS DONUTS SITE WITH ROB'S TESTIMONIAL AND MY PORTFOLIO PAGE

1.) friends and family

2.) client work

3.) personal projects

AGENCY VS INDIVIDUAL

USE BOTH. START LEANING TOWARDS INDIVIDUAL AND AIM FOR THE AGENCY.

AGENCY

MORE PROFESSIONAL CORPORATE LOOKING WEBSITE(RECCOMMENDED)

Bigger businesses tend to trust agencies over individuals

BRANDING

1.) Define yourself with a particular style

A.) Have a style associated with your brand. This includes fonts, imagery, logo, colors, etc. Keep it simple, clean and consistent.

B.) Try to showcase your personality. Give people an idea of who you are and what you are about. A lot of this will be developed along the way.

IMPROVING YOUR WEB PRESENCE

1.) Create a blog

A.) Shows your knowledge and Expertise.

B.) Gain knowledge & expertise

C.) Great for Search engine optimization

D.)Share your story

I.) "Marketing Ideas for Samll Business Owners"

II.) "How to get more \_\_\_\_\_\_\_\_\_\_\_ from your \_\_\_\_\_\_\_\_\_\_ website"

III.) "Mobile Website Tips to Increase Sales"

IV.) "Software Solutions for \_\_\_\_\_\_\_\_\_\_\_\_\_."

2.) Free eBook(Done)

3.) Create a webinar(in progress)

4.) start a youtube channel(in progress)

SOCIAL MEDIA USES

1.) Twitter

A.) Continuous Interaction

B.) Sharing tips

2.) Facebook

A.) Create groups

B.) Market your services

3.) Instagram

A.) Pictures of projects

4.) LinkedIn

A.) Network

B.) Show your work

POSITIONING AND NICHING DOWN

1.) Higher chance of being recognized as an expert

2.) charge more for your services

3.) Spend less time looking for clients

4.) Increase your perceived expertise

5.) Personalize your messaging

6.) Targeted client outreach strategy

HOW TO CHOOSE A NICHE

1. Desire
   1. What you are interested in
2. Experience
   1. Any Experience you have working in or working With people in a niche
3. Opportunity
   1. Do you have direct access to people or businesses in a niche?
   2. Some niches make more money than others
4. Time & Effort
   1. Some niches require you to put more time and effort in

NICHE WORTH

1. Payscale or glassdoor and check the salary
2. Business should be spending about 10% of their annual revenue on marketing
3. Nutritionists: $47,000/10 = $4,700 = $400 per month
4. Psychologists: $82,250/10 = $8,225 = $700 per month
5. Lawyers: $117,500/10 = $11,750 = $1000 per month

WHERE TO GET NICHE IDEAS

1. Random Google Search
   1. Search for websites, articles, businesses, etc
2. Yellow pages
   1. Get an idea of the type of businesses in your area
3. Yelp
   1. Get an idea of the type of businesses in your area
4. Craigslist
   1. Get an idea of the type of businesses in your area
5. Driving around
   1. Get an idea of the type of businesses in your area
6. Previous clients
   1. Past clients may be able to open doors to a certain niche
7. Small business forums\*\*\*
   1. A corporation is a form of organization that has an existence
8. Social media
   1. Find business owners on linkedin, twitter, etc

CLIENTS ONLY PAY THE LOWEST PRICE FOR A SERVICE WHEN THEY THINK ALL THE SERVICES OFFERED LOOK THE SAME

KNOWING YOUR WORTH(PRICING YOUR SERVICES)

1. Most freelancers undercharge for their work
   1. What is the difference between a $1,000 website, a $3,000 website and a $8,000 website?... The price! Other than that they all look pretty much the same and do basically the same things.

STRATEGIES OF HIGH EARNING FREELANCERS

1. They don’t position themselves as a commodity
2. They write winning proposals
3. They bundle their services
4. They communicate effectively
5. They add value to the project and over deliver
6. They charge a premium price for a premium service

PRICING METHODS

1. Hourly
   1. Not Recommended
   2. Take your desied annual income and add your business costs then device by the hours that you would like to work every year then factor in vacation days.
   3. Desired Salary: $60,000, Business Costs $10,000,Total: $70,000
   4. 35 hours per week with a 2 week vacation = 35 x 52 (minus your vacation) = 1,820 hours.
   5. $70,000 / $1,820 = $38.46 / hr
2. Fixed
   1. No way to know how long a project will take
   2. Estimate 50 hours x $40 / hr
   3. Add a $500 buffer
   4. Charge $2,500 total
   5. Can also create fixed website packages
3. Value Based
   1. Recommended
   2. You don’t sell hours you sell results
   3. Incentive to stay up to date with technology
   4. Create amazing things and not go over budget
   5. No hidden financial surprises
   6. Less clients and more earnings

DETERMINING VALUE BASED PRICING

1. Existing Website
   1. How much does the avg item sell for $2,000
   2. How many are sold per month: 10
   3. $20,000 monthly
   4. With a potential increase in sales of 30%
   5. + $6,000 per month
   6. Over 12 months = $ 72,000
   7. Even at only 2 extra sales per month = $48,000 per year increase
   8. $48,000/10% of revenue = $4,800 total charge to customer(Round to $5,000 for the quote)
2. No Website
   1. What is the most popular and lucrative product or service that you sell?
   2. Example Response: Out top 3 ranges are dining room, outdoor, and bedroom furniture @ $800 each. 70 sets per month
   3. How much are they budgeting to spend on marketing every month?
   4. $3,000 per month to spend on marketing
   5. 70 sets x $800 = $56,000 per month in sales
   6. If they sell nationwide online they can easily make more than this
   7. $800 x 1 set sale per day(x 30) = $24,000
   8. $24,000 per month x 12 months = $480,000
   9. 50% gross profit = $240,000 - $36,000 = $200,000
   10. Quote = 5%-10% of that = $10,000 -$20,000
3. Sells Services
   1. What is the most lucrative and most popular package you offer to clients?
   2. Answer: Around $1,000 per package at 8 clients per month
   3. Working with $8,000 per month
   4. @ $500 monthly add budget, get them 2 leads for every $100 spent(if you run linkedin ads and adwords targeting their ideal clients) = $3,000 per month x 12 months = $36,000 - $6,000 for ad costs = $30,000
   5. Quote = 5% - 10% of $30,000 = $1,500 - $3,000
   6. Based on the size and complexity of the project, you may want to set a fixed price of $5,000 because this is the minimum you will take for this type of project.

WEBSITE PACKAGES

1. Simple Website
   1. $1,000
      1. Design Template
      2. 5 page max
      3. Slideshow
      4. Hosting & domain
2. Standard Website
   1. $2,500
      1. Custom Design
      2. 10 page max
      3. CMS
      4. Contact Form
      5. Hosting & domain
3. Pro Website
   1. $5,000
      1. Custom Design
      2. Unlimited Pages
      3. CMS
      4. Contact Form
      5. Hosting & Domain
4. Elite Website
   1. $10,000

I.) Custom Design

II.) Unlimited Pages

III.) CMS

IV.) Contact Form

V.) Hosting & Domain

VI.) 1 Blog article or newsletter per month for 1 year

VII.) free consulting on anything related to your website for 6 months

VIII.) SEO services for 6 months

MONTHLY PACKAGES

1. Simple package
   1. $350 per month
      1. Complete website
      2. Hosting & domain
      3. Website maintenance
      4. 1 Blog article or newsletter
2. Standard Package
   1. $550 per month
      1. Complete Website
      2. Hosting & domain
      3. Website maintenance
      4. 1 blog article
      5. Social media management
3. Pro Package
   1. $950 per month
      1. Complete website
      2. Hosting and domain
      3. Website maintenance
      4. 2 blog articles
      5. Social media management
      6. Infographics & design
      7. Search engine optimization

MONTHLY PACKAGES

SIMPLE

$350/mo

Complete Website

Hosting & Domain

ebsite Maintenance

1 Blog Article

STANDARD

$550/mo

Complete Website

Hosting & Domain

Website Maintenance

1 Blog Article

Social Media Management

PRO

$950/mo

Complete Website

Hosting & Domain

Website Maintenance

2 Blog Articles

Social Media Management

Infographics & Design

SEO

SIMPLE WEBSITE

$1,000

Design Template

5 Page Max

Slideshow

Hosting & Domain

STANDARD WEBSITI

$2,500

Custom Design

10 Page Max

CMS

Contact Form

Hosting & Domain

PRO WEBSITE

$5,000

Custom Design

Unlimited Pages

CMS

Contact Form

Hosting & Domain

Startup

Shopify Design & Development

$3800+gst

Set-up Shopify theme

Homepage design

Up to 10 collections or categories

Up to 10 products

up to 5 content pages

Shopify payment / Pay-Pal setup

Newsletter signup and social media links

up to 3 blog index and article pages

Dedicated project manager

Personalised admin guide

Customise

Shopify Design & Development

$6800+gst

Set-up Shopify Theme

Home page design

Up to 20 collections or categories

to 50 products

up to 10 content pages

Shopify Payment / PayPal set-up

Newsletter signup and social media links

up to 3 blog index and article pages

SEO meta data, titles and description

Dedicated project manager

Personalised admin guide

Bespoke

Shopify Design & Development

Project Based

Take your project to the next

Shopify Plus

Shopify

Customisation to your brand style guide

Create a totally unique website

Create unique animation and effects

Creative design UI/UX

What's Included?

WordPress Website Design &

Development Pricing

Landing Pages

for Lead Cen

$1,500

Semi Custom

WordPress

$5,500

Custom

WordPress

$8,000

eCommerce

Websites

$10,000

Web Pro

$2500

Design Up to 75 Pages

Graphic Design

Logo Design

Copywriter Services\*

WP Engine Hosting

Professional web design

mobile responsive web design

knowledgebase setup

chatbot/live chat setup

Web Pro Plus

$3500

eCommerce Integration

Design Up to 75 Pages

Graphic Design

Logo Design

Copywriter Services\*

WP Engine Hosting

Professional web design

mobile responsive web design

knowledgebase setup

chatbot/live chat setup

Web Pro Platinu

$5000

Video Production

eCommerce Integration

Design Up to 75 Pages

Graphic Design

Logo Design

Copywriter Services\*

WP Engine Hosting

Professional web design

mobile responsive web design

knowledgebase setup

chatbot/live chat setup

Branding

Starting from $2300USD

Website

Starting from $4000USD

Branding & Website

Starting from $6000USD

Basic

$299

Basic Design

1 Page Only

.co za Domain Name

1 Emad Address

1 GB Hosting

1 Stock Image

MOST POPULAR

Professional

$499

Professional Design

IJp to 1 0 Pages

.co za Domain Name

10 x Email Add resses

10 GB Hosting

up to 5 x Stock Images

Hr Maintenance

RECOMMENDED

Premium

$999

Professional Design

Up to 25 Pages

.co za Domain Name

25 x Email Addresses

25 GB Hosting

Up to 10 x Stock Images

2Hr Maintenance

Dedicated Account Manager

Monthly Reporting

Shopping Cart

$699

Professional Design

Unlimited Prckiucts

.co za Domain Name

25 x Email Addresses

50 GB Hosting

1 Hr Maintenance

Online Shop Functionality

Payment Gateway Integration

o

O

O

O

COMMON QUESTIONS

Pricing

How can you be sure the business will achieve success?

What if the client won't tell you sales figures?

What if I don't know marketing?

How do you get paid?

FreshBooks

GETTING PAID

PayPal

MARKETING SERVICES

SEO

On and off page SEO to increase

website visitors

EMAIL MARKETING

Make customers aware of new products,

services, etc via email

CONTENT WRITING

Writing articles, blog posts, newsletters,

etc

SOCIAL MEDIA

Manage social media accounts including

posting and networking

INFOGRAPHICS

Creating infographic designs for the

website or other content

ADVERTISING

Manage Google and Facebook ads for

more visibility

MARKETING PACKAGES

SIMPLE

$350/mo

1 Blog Articles

Weekly Social Media Posts

STANDARD

$700/mo

2 Blog Articles

Weekly Social Media Posts

Infographic Design

Google Ads Management

PRO

$950/mo

3 Articles

Weekly Social Media Posts

Infographic Design

Google Ads Management

Facebook Ads Management

USE UBERSUGGEST.COM TO GET CONTENT/CONTENT WRITING TOPIC IDEAS

WHAT IS OUTSOURCING?You get paid by a client for a

task and you pay someone else

to do that task (at a profit)

WHY OUTSOURCE?

More Freedom

Allows You To Scale

WHERE TO START

Outsourcing

Websites like UpWork, Fiverr, Hubstaff Talent

Test 2 or 3 people that you feel meet your requirements

Give them a project to do to test them

Work with the one that you feel is best

HAVE A PROFIT GOAL

30% - 100%

PROMOTE YOUR WEBSITE EVERYWHERE!!

WEBSITE AUTOMATION PROCESS

1. Fill Form
   1. Client gives name and email address in exchange for free eBook
2. Download
   1. Client downloads eBook
3. Emails
   1. Send follow up emails

1. Create an account at Mailerlite.com

2. Upload your PDF eBook to Dropbox or something similar

3. Embed a form on your site to capture the information and

send them the link and follow up emails

EMAIL TO DOWNLOAD

Subject line: eBook Download from Your Name/Agency Name

Send frequency: Immediately

Hi [Name],

Thank you for downloading Internet Marketing for \_\_\_\_\_\_\_\_ Niche: 5 Ways to Get More \_\_\_\_\_\_\_\_.

Click here to instantly download your eBook.

We hope you enjoy it!

Regards,

Your Name/Agency Name

FOLLOW UP EMAIL #1

Subject line: RE: eBook Download from Your Name/Agency Name

Send frequency: 7 days after download email is sent

Hi [Name],

I'm just checking in to see if you managed to read our eBook yet?

Any questions, let me know :)

Regards,

Your Name/Agency Name

FOLLOW UP EMAIL #2

Subject line: RE: Any Value from Your Recent eBook Download?

Send frequency: 3 days after follow-up email #1

Hi [Name],

It's been 10 days since you downloaded our eBook and I'd love to know how you found it?

Did you find any value from it?

Regards,

Your Name/Agency Name

FOLLOW UP EMAIL #3 (FINAL)

Subject line: Final Follow-Up

Send frequency: 7 days after follow-up email #2

Hi [Name],

I understand you must really be busy, so this is my final email follow-up.

Would you be free for a quick chat to see how we can help your business get more customers?

Let me know?

Regards,

Your Name/Agency Name

GETTING CLIENTS VIA SOCIAL MEDIA

SOCIAL MEDIA DO’S

1. Sell YOURSELF and network with people
2. Get a little personal and build relationships
3. Twitter, Instagram, Facebook and LinkedIn
4. Create good profiles
5. Create Facebook group

]FACEBOOK GROUP POST

Hey everyone :)

I'm [First Name], the admin of this group. If any of you are interested in improving your

website or marketing, I'd love to help you!

I specialize in helping \_\_\_\_\_\_\_ get more sales.

Just DM me if you'd like to chat :)

Thanks again for being a member where we can all help each other.

SOCIAL MEDIA DON'TS

1. Don't spam your services and add no value
2. Don't Let your account be stagnant too long
3. Don't connect with anyone and everyone
4. Don't ignore constructive criticism or engage in conflict

ONLINE ADVERTISING

HOW MUCH SHOULD YOU

SPEND?

As little as possible to gain a new client

This takes some experimenting

GOOD: $300 for $3000 client

BAD: $500 for $800 client

—-------------------------------------------------------------------------------------------------

EXAMPLE FACEBOOK AD

NutriAgency Sponsored Like page

Nutritionists are busy people! With a practice to run and staff to

manage, it's easy to be preoccupied.

We specialize in helping Nutritionists grow their practice, while they

focus on running their practice,

Schedule a free consultation with us today to see how we can help

you.

[www.YourDomain.com](http://www.yourdomain.com)

—-------------------------------------

| INSERT PICTURE HERE |

—--------------------------------------

Grow Your Practice

Schedule a meeting with us,

YOURDOMAIN .COM

Contact Us

—-------------------------------------------------------------------------------------------------

CPC - Cost per click

CPM - Cost per 1,000 impressions

CPL - Cost per lead  
—-------------------------------------------------------------------------------------------------

AD EXAMPLE # 1

\_\_\_\_\_\_\_\_ are busy people! With a \_\_\_\_\_\_\_\_\_\_\_\_ to run and staff to manage,

it's easy to be preoccupied.

We specialize in helping \_\_\_\_\_\_\_\_ grow their business online, while they focus on running their business.

Schedule a free consultation with us today to see how we can help you.

[insert URL to your landing page or the lead form CTA here]

—-------------------------------------------------------------------------------------------------

—-------------------------------------------------------------------------------------------------

AD EXAMPLE #2

Interested in getting more leads for your \_\_\_\_\_\_\_\_\_\_\_ business?

We help \_\_\_\_\_\_\_\_\_\_\_\_\_\_ get more clients through effective websites and marketing.

Contact us today to see how we can help you.

[insett URL to your landing page or the lead form CTA here]

—-------------------------------------------------------------------------------------------------

—-------------------------------------------------------------------------------------------------

Instagram Example ad:

NutriAgency

NutriAgency: Nutritionists are busy people! With a

medical practice to run and staff to manage, it's easy

to be preoccupied.

—-------------------------------------------------------------------------------------------------

—-------------------------------------------------------------------------------------------------

LinkedIn Example ad

***NutriAgency***

Nutritionists are busy! You've got people to manage, and a practice to run.

At NutriAwvcy, we help Nutritionists grow their practrice, wtile they focus

on running their practice.

Schedule a tree consultation with us today to see how we can help ymj.

***Marketing and and Web Design for Nutritionists***

We grow your practice while you run your practice.

***Learn More***

—-------------------------------------------------------------------------------------------------

USING GOOGLE ADWORDS FOR ADVERTISING

Google Ads | New campaign

Select campaign settings | Set up ad groups | Create ads |Review

Ad Group: Web Design

For optimal performance. Include these keywords in your headlines:

marketing agency,

web design agency ,

web design for \_\_\_\_\_\_\_\_\_ ,

web development for \_\_\_\_\_\_\_\_,

For each group, we recommend that you create a search ad with at least   
“Good” ad strength that closely relates to the theme of your keywords.

Final URL

[www.freelancemastery.dev/](http://www.freaartemasterydev/)web-design-coffee-shops

Display path

[www.freelancemastery.dev/](http://www.freaartemasterydev/) web design / coffee shops

We specialize in helping \_\_\_\_\_\_ get more patients. Websites starting at $---,

NEGATIVE KEYWORDS(YOU DO NOT WANT YOUR AD TO COME UP WHEN PEOPLE SEARCH FOR THESE WORDS, ***DO NOT FORGET TO SET THESE)***

Courses

Ideas

Templates

Inspiration

Jobs

Learn

Udemy

Designs

Examples

WEBSITE ANALYSIS REPORTS

Offer a free 2-3 page document with suggestions

on what you think can be improved

1. Search for terms (landscapers in Dallas)

2. Open all ads

3. Open all of the websites on the 2nd page of Google

INITIAL EMAIL:

Subject line: Analysis Report for [Business Name]

Hi [Business Owner Name/Business Name],

I just found your website by searching for "[insett search term] on Google.

You're doing a great job, but there are quite a few things that can be improved on.

I have a 2 page Website Analysis Report for you with these suggestions to get more clients.

Who is the best person to send this report to?

Thank you and regards,

[Your Namel

www. YourDomain.com

FOLLOW UP EMAIL

Subject line: RE: Analysis Report for [Business Name]

Send frequency: 3 days after initial email

Hi [Business Owner Name/Business Name],

I'm just following up on my email/message sent a few days ago.

I really think you can benefit from my report.

Can you let me know which email is best to send it to?

Thank you and regards,

[Your Namel

www. YourDomain.com

Website Analysis Report for JC Landscaping

Dear Name or Business Owner Name),

It's a pleasure to provide you with my Website Analysis Report for your business.

I think you're doing a great job, but after implementing these suggestions, I'm confident

you'd do even

I found your website on the 2nd page of Google by searching for "landscapers in Dallas"

I clicked on your listing on and it went to this page:

This is a crucial landing but it currently looks like a blog.

Please find my suggestions on the following page:

•

A new modern redesign of this page and other important pages.

Display your awards better — not only in the footer.

Display your years of service better — it's a major selling point.

Add client testimonials to this page and other important pages for further credibility.

Add easily viewable images on this page and other important pages.

Add a Call to Action button like "Get a Quote" in the navbar (top) section of your website for better usability.

I also did an analysis of your page load speed on mobile devices here:

I would highly recommend improving your mobile experience, as most website visitors these days are on mobile devices,

[if you have a paid SEO tool like ubersuggest, Ahrefs, SEMrush, etc you can add some data here too, especially showing how competitors rank better than them.]

Let me know if you'd like to setup a free call to see if we could work together.

I'm more than happy to work on a proposal for you.

Kind regards,

(Your Name here)

[your email here]

Yourdomain.com

COLD EMAIL OUTREACH

5 STEP PROCESS

1. Get a CSV list of emails for your niche

2. Research a compliment for each prospect/email

3. Upload your CSV to an automated email sending platform

4. Campaign setup

5. Reply / pitch your leads

Uplead.com

Findthatlead.com

DON’T DO THIS

Hi [Business Owner Name],

I help Psychologists get more clients.

Do you have time for a quick call?

DO THIS INSTEAD

Hi [Business Owner Name],

I just read your article on The Difference Between IQ and EQ

and found it fascinating! Especially the section on how it

affects one's career.

I help Psychologists get more clients.

Do you have time for a quick call?

Examples of compliments

• I read...

• I noticed.

• I watched...

• I listened

• Thank you for...

• Congratulations…

Narre Email

Sarah [sarah@gmail.com](mailto:sarah@gmail.com) – I read your article if IQ affects career outcomes which I found fascinating

Bob [bob@gmail.com](mailto:bob@gmail.com) – Congratulations on your numerous awards from XYZ publication

Fred [fred@gmail.com](mailto:fred@gmail.com) – I noticed you wrote a Medical journal on XYZ - congratulations

John [john@gmail.com](mailto:john@gmail.com) – Thank you for contributing to helping children deal with trauma.

LEMLIST.COM

MAILSHAKE.COM

DOMAINS.GOOGLE, HOSTINGER

DO NOT USE YOUR MAIN DOMAINS FOR EMAIL CAMPAIGNS

USE GMAIL GSUITE

USE LEMLIST EMAIL WARMUP TO REDUCE NUMBER OF EMAILS GOING TO SPAM BOXES

USE IT AND TURN IT ON FOR ABOUT TWO WEEKS

$29 PER MONTH. ONLY USE FOR 2 MONTHS

MURLIST.COM INBOX WARMUP

USE FOR ABOUT 2 WEEKS

INSTRUCTIONS FOR LEMLIST.COM

' Subject: Quick Question for {{firstName}}

Hi {{firstName}}

( Hi John,)

{{icebreaker}}

(I just read your article on The Difference Between IQ and EQ and found it fascinating! Especially the section on how it affects one 's career.)

The reason for this Email is I'd love to help you get more clients-I

I've [Insert what you 've DONE for a similar Business.

Would love to see if we can do the same for you.

Are you free for a quick call to discuss it further?

Regards,

[Your Name]

CLICK ADD A NEW STEP

WAIT FOR 3 DAYS

SEND AN EMAIL

RE: QUICK QUESTION FOR {{FIRSTNAME}}

Hi {{firstName}}

I just want to make sure you received my email sent a few days ago?

Happy to answer any questions you may have.

{{sender.name}}

CLICK ADD A NEW STEP

WAIT FOR 5 DAYS

SEND AN EMAIL

FINAL FOLLOW-UP

Hi {{firstName}}

This is my final follow-up regarding my email.

We'd love to help you grow your business

Please let me know if you're interested in a quick call?

Regards,

{{sender. name}}

CLICK SAVE

REVIEW THE CAMPAIGN

MAKE SURE YOU ANALYZE THE DATA YOU GET FROM THE EMAIL CAMPAIGN

TRY TO FIND OUT WHY SOMEONE DOES NOT PURCHASE YOUR PRODUCT OR WHAT YOU CAN IMPROVE.

INITIAL EMAIL

Subject line: Question for [Agency Namel

"Hey, I'm (insert Name].

I'm a freelance web developer in [insert City].

I had a look at your agency and love [insert a sentence on what you love about them after researching].

The reason for this email is to let you know that I'd love to work with you on a contract basis.

If you have any projects or tasks you'd like to outsource, I'd love to help!

I'm knowledgeable in [insert your skills].

Please let me know if you'd like to discuss this further?

Thank you and regards,

[your name]

[your portfolio website}

AUTOMATED LINKEDIN OUTREACH USING LINKHELP

LINKHELP.IO

THE PRE-PROPOSAL PHASE

10 HELPFUL QUESTIONS TO

1. What does your business do?
2. Who is your target market?
3. What is the desired action for website visitors?
4. What makes you unique from your competitors?
5. What is an avg client/customer worth?
6. How do you currently get new clients/customers?
7. How many clients/sales do you get per month?
8. Do you have any professional images & branding?
9. When would you like the project completed?
10. Anything else that I should know?

IF SOMEONE SEEMS TO HAVE A SMALL BUDGET

"Do you have a budget set aside for this project and is it at least

$xxx (insert your absolute minimum desired amount)?"

PROPOSAL TEMPLATE

Intro/Cover Page

Project Overview

Quote Options

Terms of Agreement

INTRO/COVER PAGE

Your information:

Your Name

123

Bread County, 88888

www.vourw•ebsite.com

Clients information;

Tuesday. 5 May, 2020

Client’s Name

Company Name

Dear Name,

Thanks for discussing your business with me yesterday. I’ve compiled three options that i believe will accomplish the goals that we discussed

Please review my proposal and let me know if you have any questions or comments, I’II contact you next Tuesday if I haven't heard from you by then.

Regards,

Your Name

PROJECT OVERVIEW

Highlighting the problem

PROJECT OVERVIEW

COMPANY (replace with the company name) would like to improve their existing website to focus on generating more free consultations which will result in more paying clients.

You recognize the importance of a conversion-centered website and thus the reason for a professional redesign with this purpose in mind.

Over 50% of your website visitors are viewing the website on their mobile device. The website will primarily be focused on a clear and simplified process to request a free consultation with less distractions.

You are currently running multiple marketing campaigns on various channels and the website wil need to be tailored to the visitors from these channels using effective landing pages that are relevant to the visitor and achieves the necessary business goals of booking a free consultation.

According to your data, only 2% of website visitors result in free consultations and 10% of free consultations result in paying clients.

PROJECT OVERVIEW

Showcasing the solution

The goal would be to double the number of free consultations to at least 4%, which I believe is a Iow estimate based on the results I've seen in similar industries focused around effective call-to-actions (free consultations).

Realistically, I do believe we could achieve a 6 — 8% conversion rate of free consultations once the site has been completed and improved on, but I am 100% confident that 4% is a low estimate.

At an average value of $1,250 per client and based on double your existing monthly client sign ups (4 per month), I'm very confident we could achieve 4 additional sign ups per month (4 x $1,250 = $5,000) or 48 additional sign ups per year (48 x $1,250 = $60,000).

As a reference, below is the contact email of John Smith. After working with him on a similar project, his business almost tripled in sales within one year:

John Smith

Director at XYZ

INITIAL EMAIL

Subject line: Your Proposal From [Your Name/Company Name]

Hi [Client's Name],

Thanks for discussing your business with me yesterday. I've compiled 3 options I believe will help achieve the

business goals we've discussed.

Please review my proposal and let me know if you have any questions or comments. I will contact you next

Tuesday if I haven’t heard from you by then.

Regards,

Your Name

POST-PROPOSAL PHASE

Follow up after a week

If you haven't heard back, keep

following up

If they say no, find out why

CREATING INVOICES

WHEN DO YOU SEND THE

INVOICE?

You talked about the project

You went over the proposal

The client approved and signed

HOW MUCH DO I INVOICE

THEM FOR?

It's completely up to you\

UPSELLING CLIENTS

UPSELLING = PITCHING NEW

SERVICES TO EXISTING CLIENTS

Upsell if they're getting GOOD results

Upsell if they're getting BAD results

YOU DON'T NEED TO UPSELL

EVERYONE

if you can't explain how the additional purchase

will benefit the customer's overall goals, then

don't push for an upsell

INlTlAL EMAIL (Good Results)

Subject line: Let's Get Even Better Results!

Hi [Client's Name],

I'm so glad to see the results we've had over the past 3 months.

I know we agreed on Option 2, which seems to be doing great, but I'd like to propose Option 3, which I feel would result in even better

results.

Option 3 includes:

•x

•x

•x

For $X /month.

Please let me know your thoughts and if you'd like to proceed with Option 3? I will then send through an updated Proposal and Invoice.

Regards,

Your Name

INITIAL EMAIL (Bad Results)

Subject line: Let's Get Better Results!

Hi [Client's Name],

It's been 3 months now, and I think we're both not satisfied with the results so far.

I'm confident that if we were to [insert what you think the solution is here], we should get better results.

I'd like to propose proceeding with the following:

•x

•x

•x

For $X /month.

Please let me know your thoughts and if you'd like to proceed with this for at least 3 months? I will then send through an updated

Proposal and Invoice.

Regards,

Your Name

CLIENT SERVICE AGREEMENT

**CLIENT SERVICE AGREEMENT**

**1 IDENTIFICATION OF THE PARTIES**

1.1 This Service Agreement (the ‘Agreement’) is made and entered into on this [Current Date] day of [Current Month] (the ‘Effective Date’) by and between [Client Company Name] with its registered address at [Client Company Address] (the ‘Client’) and [Your Company Name] (the ‘Service Provider’).

1.2 The Client and the Service Provider are hereinafter referred to individually as a ‘Party’ and collectively as the ‘Parties’.

1.3 By accepting this Agreement and subject to the terms and conditions herein, the Service Provider agrees to provide [Website Development / Marketing Services / Website and Marketing Services] (the ‘Services’) to the Client in connection with its business operations.

**2 ENGAGEMENT AND SERVICES**

*[Section 2.1 is for project-based work.]*

2.1 The Client hereby engages the Service Provider to provide and perform the following Services in connection with [Website Development / Marketing Services / Website Development and Marketing Services]. These Services shall include the following:

2.1.1 Website Development

2.1.2 Marketing Strategy and Improvements

2.1.3 AdWords Campaign Setup, On-page SEO Improvements, Social Media Ad Campaign Setup

2.1.4 Weekly Progress Reports

*[Section 2.2 is for retainer-based work or services that you bill by the hour. Only keep and edit the necessary services of this section if you’re doing this type of work, otherwise remove it.]*

2.2 The Client hereby engages the Service Provider to provide and perform the following Services on an ongoing basis, in terms of a retainer arrangement **OR** to be billed on an hourly basis, in connection with [insert name or description of project/business operations]. These Services shall include the following

2.2.1 Website Development

2.2.2 Marketing Strategy and Improvements

2.2.3 AdWords Campaign Setup, Social Media Ad Campaign Setup

2.2.4 Content Writing and SEO

2.2.5 AB Split Testing and Optimization

2.3 All Services to be performed by the Service Provider shall be performed with promptness, in a diligent manner and at a level of proficiency to be expected from the Service Provider with the background and experience that the Service Provider has represented it has. The Client shall provide the Service Provider with the necessary access to information, property and personnel as may be reasonably required in order to permit the Service Provider to perform the Services listed above.

**3 SERVICE PERIOD AND TERMINATION**

3.1 This Agreement shall commence on the Effective Date and shall remain in effect until the completion of the Service or the earlier termination of this Agreement as provided in section 3.2 of the Agreement.

This Agreement shall commence on [date] and shall run indefinitely **OR** terminate on [date].

3.2 Either party may elect to terminate the Agreement by providing at least one months’ notice (30 calendar days) to the other Party. Such notice must be in writing. Payment for the Services performed to date are not recoverable upon termination. Termination does not preclude the Client from payment of Services to date of termination and up to the final day of the month in which the agreement is terminated. Any expenses incurred by the Service Provider or to be incurred on behalf of the Client at the date of learning of the termination will still be due and payable.

3.3 Either Party will be informed in writing at of any change in the Service Agreement at least one month in advance of the termination of a service.

3.4 Upon the effective date of termination of this Agreement, all legal obligations, rights and duties arising out of this Agreement shall terminate except for such legal obligations, rights and duties as shall have accrued prior to the effective date of termination and except as otherwise stated in this Agreement.

**4 FEES FOR SERVICES PERFORMED**

4.1 Payment is to be made via [PayPal / Freshbooks / Electronic Bank Transfer / Transferwise, etc.] within 3 working days on receipt of invoice to the following account details:

[Insert your bank details or your account name]

4.2 Project Based Work:

4.2.1 The Client agrees to pay the Service Provider a project fee of [$3,500.00]. The Service Provider’s obligation to render the Services mentioned in Section 2 of this Agreement is conditional upon payment by the Client in the following terms (the ‘Project Based Schedule’):

4.2.1.1 100% upfront payment upon receipt of Invoice.

*[Note: I ALWAYS advocate for 100% payment upfront as it solves almost every issue.]*

*[****OR*** *if the client is difficult and they don’t want to pay upfront, then settle on a 50% down payment and the remaining 50% on completion or at a set date, say a month after the down payment.*

*Section 4.2.1.2 – 4.2.1.3 is for if you do projects with any down payments. Only keep and edit this section if you’re pricing your project like this, otherwise remove it.]*

4.2.1.2 50% down payment upon receipt of Invoice (the ‘Down Payment’).

4.2.1.3 The remaining 50% is to be paid upon completion of website **OR** on [date].

*[****IF*** *you decide on getting the final payment on ‘completion’, you need to be clear as to what ‘completion’ actually is, because the client may have something different in their mind. I prefer to get the final payment on a set date in advance BEFORE the project has been completed as it’s a relative term and can delay payment until the client sees it as ‘completed’. Only keep and edit 4.2.1.4 if you’re going to price based on completion, otherwise remove it.]*

4.2.1.4 The completion of the project is described hereunder:

· Fully functional conversion-focused e-commerce website (up to 50 products).

· Optimizing each page for on-page SEO.

· Marketing campaigns for AdWords and Social Media (Facebook).

4.2.2 If during any time of the project duration the Client fails to make payment in terms of the Project Based Schedule, the Service Provider may cease provision of the Services until payment of the outstanding fee has been made. If a portion of such outstanding fee remains unpaid for more than 14 days after becoming due, a penalty of 15% of the outstanding amount will become due and payable. The Service Provider is not obligated to provide Services to the Client if there are any outstanding fees or penalties remaining due and payable.

*[Section 4.3 is for retainer-based work. Only keep and edit this section if you’re doing this type of work, otherwise remove it.]*

4.3 Retainer based work

4.3.1 In consideration for Services rendered, the Client agrees to pay the Service Provider’s fee of [$850.00] which will be due up front on the first of each month for that month’s Services until the Agreement has ended.

4.3.2 If such amount is not received by this date, the Service Provider reserves the right to cease provision of Services to the Client. If a portion of an outstanding fee remains unpaid for more than 14 days after becoming due, a penalty of 15% of the outstanding amount will become due and payable.

4.4 Advertising fees

4.4.1 All advertising fees, such as Google Ads, Facebook Ads, and any other related advertising fees, are for the Client’s account.

4.4.2 The Client is committed to spend a minimum of [$1,000.00] for Google Ads and [$500.00] for Facebook Ads each month, for the validity of this Agreement.

**5 OBLIGATIONS OF THE CLIENT**

5.1 The Service Provider will not commence work until the Client has provided all the necessary data, photography, tools and other necessary information that may be required by the Service Provider to effectively perform the Services rendered.

5.2 The Client agrees that the completion of one or more of the deliverables may depend on and require the Client’s commitment of certain resources which should be promptly provided. The Client agrees to provide such resources as are necessary to fulfil the Service Provider’s and its own obligations under this Agreement and to timely complete and fulfil its required actions in order for the Service Provider to be able to fully comply with its obligations under this Agreement. The Client’s failure to provide such resources and to timely fulfil such obligations shall not constitute a basis for the retention of payments and/or allegations of breach of contract by the Client.

**6 OWNERSHIP AND RISK**

6.1 The Service Provider remains the owner of all equipment, software and records used or produced in the service of the Client, until the amount owed by the Client to the Service Provider has (have) been paid in full.

6.2 After payment in full, the Client is the owner of all products, data and reports produced by the Service Provider.

6.3 The Service Provider is not responsible for anything falling outside the scope of services referred to in Section 2 of the Agreement unless such services have been agreed to in writing. These additional Services shall be subject to the terms and conditions of the Agreement as if they have been incorporated hereto.

6.4 The Client hereby guarantees that the Service Provider shall not be held liable for the results or does not warranty any results flowing from the Services provided by the Service Provider. It is acknowledged that such Services are based on subjective influences which hold no bearing on the liability of, nor can they be controlled by, the Service Provider.

**7 CONFIDENTIALITY AND RESPONSIBILITY**

7.1 In this Agreement, the Services performed and any and all information relating to the Client’s business, including, but not limited to, research, developments, products plans, products, services, diagrams, formulae, processes, techniques, technology, software, ideas, discoveries, designs, inventions, improvements, copyrights, trademarks, marketing, sales, trade secrets, intellectual property, finances disclosed by the Client is hereinafter referred to as ‘Confidential Information‘.

7.2 Confidential Information does not include information which:

7.2.1 Is in or comes into the public domain without a breach of this Agreement by the Service Provider.

7.2.2 Was in the possession of the Service Provider prior to receipt from the Client and was not acquired by the Service provider from the Client under an obligation of confidentiality or non-use.

7.2.3 Is acquired by the Service Provider from a third party not under an obligation of confidentiality or non-use to the Client.

7.2.4 Is independently developed by the Service Provider without use of any confidential information of the Client.

7.3 Unless otherwise agreed to in advance and in writing by the Client, the Service Provider will not, except as required by law or court order, use the Confidential Information for any purpose whatsoever other than the performance of the Services or disclose the Confidential Information to any third party.

7.4 Upon termination or expiration of this Agreement for any reason, or upon the Client’s earlier request, the Service Provider will deliver to the Client all of the Client’s property or Confidential Information in tangible form that the Service Provider may have in their possession or control.

7.5 The enlisting of third parties outside the Agreement to carry out the Services shall be subject to the consent of the Client if and in so far as such enlistment would create a foreseeable risk with respect to Confidential Information.

**8 NO COMPETITION**

8.1 During the term of this Agreement, the Service Provider will engage in no business or other activities which are directly competitive with the business activities of the Client’s local geographic target audience in the Client’s respective trading city/town without obtaining the prior written consent of the Client.

**9 WARRANTIES**

9.1 The Service Provider warrants and represents that it has full capacity and authority to enter into the Agreement and that the Services performed by the Service Provider, or any third party instructed by the Service Provider, will be rendered in accordance with sound professional practices and in a competent manner of the level of capability represented to the Client.

9.2 The Client warrants and represents that it has full capacity and authority to enter into the Agreement and has the ability, including relevant permissions, licences and consents necessary to perform its obligations in terms of the Agreement.

9.3 Except as provided for in this Agreement, the Parties make no further warranties either expressly or impliedly.

**10 INDEPENDENT CONTRACTORS**

10.1 The Service Provider agrees that all Services will be performed by the Service Provider as an independent contractor and that this Agreement does not create an employer-employee relationship between the Service Provider and the Client. The Service Provider shall have no right to receive any employee benefits provided by the Client to its employees. The Service Provider agrees to pay all taxes due in respect of the Service Fee and to indemnify the Client in respect of any obligation that may be imposed on the Client to pay any such taxes or resulting from the Service Provider’s being determined not to be an independent contractor. This Agreement does not authorize the Service Provider to act for the Client as its agent or to make communications on behalf of the Client.

**11 LIMITATION OF LIABILITY**

11.1 In no event shall the Service Provider be liable to the Client for any loss of profit, loss of business, loss of data, or for any indirect, incidental, consequential, special or exemplary damages arising in connection with the services provided to client or any agreement between the parties relating thereto (whether based on breach of contract, breach of warranty, negligence or any other legal theory), even if the Service Provider has been advised of the possibility of such damages.

11.2 The entire liability of the Service Provider to the Client in connection with the Services provided to the Client and any agreement between the parties relating thereto (whether based on breach of contract, breach of warranty, negligence or any other legal theory) shall not exceed, in the aggregate, the total amount of fees paid or becoming due under this Agreement in the twelve (12) month period immediately preceding the event giving rise to such liability.

11.3 The abovementioned limitations in this section of the Agreement shall not apply to a breach of confidentiality or a breach of one’s rights or obligations under the transfer of intellectual property rights as set out in section 7.

**12 TRANSFER OF INTELLECTUAL PROPERTY RIGHTS**

12.1 The Service Provider grants all IP rights to the Client upon final payment for the Services performed in exchange for a right to use the content developed for marketing and business development purposes, and retains ownership over the Work Product.

The Service Provider shall, upon the Client’s compliance with the terms of the Agreement and final payment for Services performed, transfer or convey to the Client all rights, including, without limitation, copyrights, patents, trade secret rights, and other intellectual property rights associated with any ideas, concepts, inventions, works of authorship, Confidential Information – that have been or will be developed or created by the Service Provider, solely or jointly with others, for the Client for use in perpetuity in any manner whatsoever (the ‘Work Product’). The Service Provider waives any moral right in respect of the Client’s use of the Work Product. Notwithstanding the aforementioned clauses, the Client hereby agrees, irrevocably and non-exclusively, to grant the Service Provider a right to display the written or visual content developed by the Service Provider for the Client in advancing the Service Provider’s business development and marketing strategy. Notwithstanding the aforementioned, the Service shall retain ownership to certain aspects of the Work Product:

· Google Ads Account, Campaign Setup and Strategy

· Facebook Ads Account, Campaign Setup and Strategy

12.2 The Service Provider shall maintain ownership to all rights, including, without limitation, copyrights, patents, trade secret rights, and other intellectual property rights associated with any ideas, concepts, techniques, inventions, processes, works of authorship, Confidential Information or trade secrets – that have been or will be developed or created by the Service Provider, solely or jointly with others, for the Client (the ‘Work Product’). The Service Provider reserves the right to use the intellectual property rights for display, publication, advertising or other purposes. Upon receipt of final payment, Client grants the Service Provider a non-exclusive, unlimited license to use the Work Product.

**13 ASSIGNMENT**

13.1 The Services to be performed by the Service Provider herein are personal in nature, and the Client has engaged the Service Provider as a result of the Service Provider’s expertise relating to such Services. The Service Provider, therefore, agrees that it will not assign, sell, transfer, delegate or otherwise dispose of this Agreement or any right, duty, or obligation under this Agreement without the Client’s prior written consent. Nothing in this Agreement shall prevent the assignment by the Client of this Agreement or any right, duty or obligation herein to any third party

**14 GOVERNING LAW AND DISPUTE RESOLUTION**

14.1 This Agreement shall be construed in accordance with and be subject to the laws of the [your state if in you’re in the US or your country]. All court proceedings relating to or arising out of this Agreement shall be solved by the Courts of [your state if in you’re in the US or your country].

14.2 The Parties agree to attempt to settle any dispute arising out of or relating to the Agreement amicably, before commencing any court proceedings, which includes mediation and/or arbitration.

14.3 If the mediation fails, then the Parties will attempt jointly to make a written record of those matters (if any) relating to the dispute which have been agreed to by them, for submission in any later arbitration. The mediator’s role will cease, at the latest, upon commencement of any arbitration proceedings. The mediator will not be available to appear as a witness in the arbitration, nor to provide any additional evidence obtained during the mediation. The Parties agree that their good faith in conducting any mediation proceedings is a condition to pursuing any other legal or equitable remedy which includes litigation, arbitration or other dispute resolution procedures.

14.4 Any disputes arising out of or in connection with this dispute which cannot be settled in accordance with section 14.2 above, shall be settled in accordance with the rules of arbitration by one or more arbitrators in accordance with the said rules.

**15 RECOVERY OF LITIGATION EXPENSES**

15.1 If any legal action, arbitration or other proceeding is necessary for the enforcement of this Agreement or because of an alleged dispute, breach, default or misrepresentation with the provisions of this Agreement, the prevailing party or parties shall be entitled to recover reasonable attorneys’ fees and other costs incurred in that action or legal proceedings.

**16 GENERAL**

16.1 This Agreement constitutes the entire agreement of the Parties on the subject hereof and supersedes all prior understandings and instruments on such subject. This Agreement may not be modified other than by a written instrument executed by duly authorized representatives of the Parties.

16.2 No waiver of any provision of this Agreement shall constitute a waiver of any other provision(s) or of the same provision on another occasion. Failure of either Party to enforce any provision of this Agreement shall not constitute a waiver of such provision or any other provision(s) of this Agreement.

16.3 Should any provision of this Agreement be held by a court of competent jurisdiction to be illegal, invalid, or unenforceable, such provision may be modified by such court in compliance with the law giving effect to the intent the Parties and enforced as modified. All other terms and conditions of this Agreement shall remain in effect and shall be construed in accordance with the modified provision.

**17 SEVERABILITY**

17.1 If any court of competent authority finds that any provision of this Agreement (or part of any provision) is invalid, illegal, or unenforceable, that provision or part provision shall, to the extent required, be deemed to be deleted, and the validity and enforceability of the other provisions of this Agreement shall not be affected.

**18 SIGNATURES**

18.1 The Parties duly execute this Agreement by their signatures below:

Company: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Company: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

STARTING THE PROCESS

Website Development Process

OVERALL TIMELINE

1. Chat With Client

2. Send The Proposal

3. Send The Contract

4. Send The Invoice

5. Get Paid

6. Get Client Info

7. Start On Project

8. Get Feedback/ Revisions

9. Deliver Final Project

10. Marketing & Upselling

ONBOARDING: GET CLIENT INFO

Logo (png, jpg, eps, psd, etc)

Images and / or Illustrations (png, jpg, eps, psd, etc)

Videos

Content (About page, privacy policy, terms of service, etc)

Hosting Login

CMS Login (If applicable)

Social & Ad Account Access (If applicable)

Payment Gateway Login (for any e-commerce functionality)

5 PHASES OF DEVELOPMENT

1. DESIGN / MOCKUPS

Create design mockups,

wireframes, choose a theme,

Etc.

1. LOCAL SETUP
   1. Setup your local web dev environment, IDE, Git
2. DEVELOP
   1. Create the website/app on your local machine.
3. STAGING SERVER
   1. Setup a live server to show the project to the client. Make any revisions needed
4. DEPLOY
   1. Deploy to the final server, setup domain, etc

DESIGN AND MOCKUP

DESIGN INSPIRATION

Ask the client for examples of what they like

Look at competitor websites

Website themes & templates

Do not copy, but look for inspirations in other designs & layouts

that you can use to create something on your own

CLIENT RELATIONSHIP BUILDING AND COMMUNICATION

BUILDING STRONG RELATIONSHIPS

1 . Always Be Kind & Fair

2. Treat People Like Humans NOT Assets

3. Remember Important Events

4. Reward Loyalty

5. Listen To Your Clients

MANAGING CLIENT EXPECTATIONS

TIPS TO MANAGE EXPECTATIONS

Don't assume anything

Be clear on what & when you're delivering

Expectation goes both ways

Setting boundaries is important

THINGS TO CONSIDER WHEN TAKING A NEW CLIENT

How much a client is paying you

How long will it take to do the work

What your current cash flow is

Your happiness

ClickUp

Trello

asana

Notion

Basecamp

REVISIONS / CHANGES

Did you manage the client's expectations well?

Were they aware of the overall design?

Did you specify a number of revisions?

ONGOING WEBSITE UPDATES

Offer a new proposal for

ongoing changes &

Maintenance:

Adding new content

Adding new functionality

Software updates

Bug fixes

Marketing & content services

MONTHLY WEBSITE REPORTS

Any updates, work done

Sales / signups

SEO & Ad performance

Website statistics & analytics

Recommendations

==========================================================================================================================================

CLIENT SERVICE AGREEMENT OVERVIEW: What it is and explaining the legal jargon in a non-jargon way INTRO A year ago, I got screwed with $5,500. I did the work, the client was happy, and he just decided one morning to initiate a PayPal refund request and that was it - $5,500 left my account. I disputed it, but there was a major problem: I didn’t have a contract in place. Things are different now, but I learned my lesson and that’s exactly why you have this contract. I don’t want you to lose out like I did, and this contract will help you avoid and/or be better equipped to handle legal disputes if they do come up. Not only that, but it also helps put everything in perspective about what the client can expect from you, what you expect from the client, etc. If you’re offering once-off projects or retainer work, this will be a helpful template for you. As a general rule, and only if it’s a not a deal-breaker, try and avoid receiving high-value payments via PayPal and get payment upfront – this will solve most potential legal disputes. DISCLAIMER The legal resources provided within this template, including the master service agreement contract and overview are resources for informational and educational purposes only and should not take the place of hiring an attorney. Using this template does not create an Attorney-Client relationship between you and its creators. Personalized legal advice is not provided within this resource. This template provides legal information created for awareness of significant legal issues that arise between freelancers and their clients and provides you with recommended language to govern that agreement and relationship. GENERAL OVERVIEW FOR CHANGES The changes you need to make are: RED – Replace the necessary info such as the date, address, platform, etc. GREEN – Remove/Add what is a necessary service. BLUE – Explains the relevant section and what you need to do with it such as removing a section if it does not apply to your service that you are offering. You need to remove this text completely. Other than that, do not make any other adjustments to this agreement. It’s needless to say, but when you do make the changes, remove the squared brackets [ ] and change the color of all text to black. GENERAL OVERVIEW AND INSTRUCTIONS OF CONTENT 1 IDENTIFICATION OF THE PARTIES 1.1 This Service Agreement (the ‘Agreement’) is made and entered into on this [Current Date] day of [Current Month] (the ‘Effective Date’) by and between [Client Company Name] with its registered address at [Client Company Address] (the ‘Client’) and [Your Company Name] (the ‘Service Provider’). 1.2 The Client and the Service Provider are hereinafter referred to individually as a ‘Party’ and collectively as the ‘Parties’. 1.3 By accepting this Agreement and subject to the terms and conditions herein, the Service Provider agrees to provide [Website Development / Marketing Services / Website and Marketing Services] (the ‘Services’) to the Client in connection with its business operations. Section 1 above is outlining WHO the agreement is with and WHAT it’s about. 2 ENGAGEMENT AND SERVICES 2.1 The Client hereby engages the Service Provider to provide and perform the following Services in connection with [Website Development / Marketing Services / Website Development and Marketing Services]. These Services shall include the following: 2.1.1 Website Development 2.1.2 Marketing Strategy and Improvements 2.1.3 AdWords Campaign Setup, On-page SEO Improvements, Social Media Ad Campaign Setup 2.1.4 Weekly Progress Reports Section 2.1 above is for project-based (a set period of work) or once-off work (such as a website). This is where you will list the main tasks such as Content Writing, Website Development, Logo Design, etc. – whatever is necessary to your service offering. 2.2 The Client hereby engages the Service Provider to provide and perform the following Services on an ongoing basis, in terms of a retainer arrangement OR to be billed on an hourly basis, in connection with [insert name or description of project/business operations]. These Services shall include the following 2.2.1 Website Development 2.2.2 Marketing Strategy and Improvements 2.2.3 AdWords Campaign Setup, Social Media Ad Campaign Setup 2.2.4 Content Writing and SEO 2.2.5 AB Split Testing and Optimization Section 2.2 above is for retainer-based work or services that you bill by the hour. This is for monthly work. 3 SERVICE PERIOD AND TERMINATION 3.1 This Agreement shall commence on the Effective Date and shall remain in effect until the completion of the Service or the earlier termination of this Agreement as provided in section 3.2 of the Agreement. This Agreement shall commence on [date] and shall run indefinitely OR terminate on [date]. Section 3.1 above is outlining how long the project will be for and the remainder of section 3 outlines the terms for cancellation and any adjustments to the agreement. 4 FEES FOR SERVICES PERFORMED 4.1 Payment is to be made via [PayPal / Freshbooks / Electronic Bank Transfer / Transferwise, etc.] within 3 working days on receipt of invoice to the following account details: [Insert your bank details or your account name] 4.2 Project Based Work: 4.2.1 The Client agrees to pay the Service Provider a project fee of [$3,500.00]. The Service Provider’s obligation to render the Services mentioned in Section 2 of this Agreement is conditional upon payment by the Client in the following terms (the ‘Project Based Schedule’): 4.2.1.1 100% upfront payment upon receipt of Invoice. Section 4.2 – 4.2.1.1 above deals with getting paid. I ALWAYS advocate for 100% payment upfront as it solves almost every issue. Try this and if it’s a deal-breaker, only then should you consider another payment method like the example in 4.2.1.2 below. 4.2.1.2 50% down payment upon receipt of Invoice (the ‘Down Payment’). 4.2.1.3 The remaining 50% is to be paid upon completion of website OR on [date]. Section 4.2.1.2 – 4.2.1.3 above deals with splitting up the amount in multiple payments. If you decide on getting the final payment on ‘completion’, you need to be clear as to what ‘completion’ actually is, because the client may have something different in their mind. I prefer to get the final payment on a set date in advance BEFORE the project has been completed as it’s a relative term and can delay payment until the client sees it as ‘completed’. So in this case, let’s say you know a website will take 3 months, you get the 50% deposit upfront before you start, and then the other 50% at the end of the 2nd month. 4.3 Advertising fees 4.3.1 All advertising fees, such as Google Ads, Facebook Ads, and any other related advertising fees, are for the Client’s account. 4.3.2 The Client is committed to spend a minimum of [$1,000.00] for Google Ads and [$500.00] for Facebook Ads each month, for the validity of this Agreement. Section 4.3 above is pointing out that all ad spend related costs are for the client’s account. IF you do decide to absorb this cost and pay the ad spend directly, then change the words “Client’s account” to “Service Provider’s account” and also update 4.3.2 to say, “The Service Provider” rather than “The Client”. 8 NO COMPETITION 8.1 During the term of this Agreement, the Service Provider will engage in no business or other activities which are directly competitive with the business activities of the Client’s local geographic target audience in the Client’s respective trading city/town without obtaining the prior written consent of the Client. Section 8.1 above relating to you as the Service Provider is important to reiterate when it comes to working with the same client industry in the same city. Let’s say you have a dentist client in San Francisco. You can’t work with another client in San Francisco (as long as they are working with you or the period mentioned in the contract), but you can work with a client in San Diego is no problem as it’s a different city. 12 TRANSFER OF INTELLECTUAL PROPERTY RIGHTS 12.1 The Service Provider grants all IP rights to the Client upon final payment for the Services performed in exchange for a right to use the content developed for marketing and business development purposes, and retains ownership over the Work Product. The Service Provider shall, upon the Client’s compliance with the terms of the Agreement and final payment for Services performed, transfer or convey to the Client all rights, including, without limitation, copyrights, patents, trade secret rights, and other intellectual property rights associated with any ideas, concepts, inventions, works of authorship, Confidential Information – that have been or will be developed or created by the Service Provider, solely or jointly with others, for the Client for use in perpetuity in any manner whatsoever (the ‘Work Product’). The Service Provider waives any moral right in respect of the Client’s use of the Work Product. Notwithstanding the aforementioned clauses, the Client hereby agrees, irrevocably and non-exclusively, to grant the Service Provider a right to display the written or visual content developed by the Service Provider for the Client in advancing the Service Provider’s business development and marketing strategy. Notwithstanding the aforementioned, the Service shall retain ownership to certain aspects of the Work Product: • Google Ads Account, Campaign Setup and Strategy • Facebook Ads Account, Campaign Setup and Strategy Section 12 is referring to the IP, your Intellectual Property. Let’s say you create an AdWords Account and manage it each month for your client, and they leave you after 6 months, should you give the client access to this account? No, you should not. Why? Because it’s your marketing strategy – it’s what you created to get the client more sales and this is your IP, in this case, it’s the ‘Work Product’ and this type of IP is yours – not the client’s.

18 SIGNATURES

18.1 The Parties duly execute this Agreement by their signatures below:

Company: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Company: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

The agreement will not be valid until the client signs it, so get the signature and information of the client, and the other section is for you to sign.

Your Name

123 Bakersville

Bread County, 8888

youremail@gmail.com

[www.yourwebsite.com](http://www.yourwebsite.com)

December 31, 2019

Client’s Name

*Owner*

Company Name

Dear *Client Name*,

Thanks for discussing your business with me yesterday. I’ve compiled 3 options I believe will help achieve the business goals we’ve discussed.

Please review my proposal and let me know if you have any questions or comments. I will contact you next week Tuesday if I haven’t heard from you by then.

Regards,

*Your Name*

**PROJECT OVERVIEW**

*BUSINESS COMPANY* would like to improve their existing website to focus on getting more free consultations which will result in more paying clients.

You recognize the importance of a conversion-centered website, and thus the reason for a professional redesign with this purpose in mind.

As per your analytics data, over 50% of your website visitors are viewing the website on their mobile device. Our goal will be to create a clear and simplified process to request a free consultation with less distractions.

You are currently running multiple marketing campaigns on various channels and the website will need to be tailored to the visitors from these channels using effective landing pages that are relevant to the visitor and achieves the necessary business goals.

Currently, 2% of website visitors result in free consultations and 10% of free consultations result in paying clients.

The goal would be to increase the number of free consultations to 4 or 5% which I believe is a low estimate based on the results I’ve seen in similar industries focused around effective call-to-actions (free consultations).

At an average value of $1,250 per client and based on double your existing monthly client sign ups (4 per month), I’m very confident we could achieve **4 additional sign ups per month** (4 x $1,250 = $5,000) or 48 additional sign ups per year (48 x $1,250 = $60,000).

Below is the contact email of John Smith. After working with him on a similar project, his business almost tripled in sales within one year. I mention this just to backup what I’ve stated above.

John Smith

Director at XYZ

johnsmith@xyz.com

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|  | | Page 1 of 3 | | --- | |

**PROJECT OPTIONS**

I’ve listed 3 possible options below for the project. You will notice that option 3 has a monthly retainer service included. This provides you with on-going access to my expertise in this area as well as the tasks outlined below.

Based on our previous conversations, I would estimate and recommend that you will benefit from my retainer services for a minimum of 3 – 6 months.

**Option 1:**

I will redesign *COMPANY* website focused on acquiring more free consultations as the main priority.

Additional services under this option include:

• Integrating social media profiles

• Integrating your email marketing service provider

• Google Analytics integration

**Option 2:**

This option includes everything from option 1, but also includes the following additional services:

• Submission to Google Search Console for SEO purposes

• 10 Premium Stock Photo Images

• Creation of 3 additional landing pages for various marketing campaigns

**Option 3:**

| | Page 2 of 3 | | --- | |
| --- | --- |

This option includes everything from options 1 and 2, but also includes the following additional services:

• AdWords account setup, creating effective campaigns and monitoring for improvements

• Local directory submissions (this boosts your SEO results)

• Google local listing (this boosts your SEO results)

• Integrating and configuring additional CTA software tools like SumoMe

• Integrating live-chat software (Zopim)

| | Page 3 of 3 | | --- | |
| --- | --- |

**TERMS OF AGREEMENT**

You will notice that I don’t provide an hourly billing cost. This is harmful to you as it discourages efficiency and creativity from my part and in the end, we are both focused on the outcome and not inefficient hours worked.

The prices provided below are fixed, which means there are no hidden fees and I absorb all the risk in completing the project within these boundaries.

The pricing for each option is as follows:

Option 1 is $4,000 once-off

Option 2 is $5,250 once-off

Option 3 is $6,500 once-off + a $750/month retainer

Once-off fees are to be paid in full upfront and the retainer amounts are due at the beginning of each month.

Please select the option you prefer with an “X” and sign below:

Option 1

Option 2

Option 3

Name: Client Name:

Signature: Client Signature:

Date Signed: Date Signed:

*Upon receipt of this agreement, I will send through a contract and an invoice for payment.*

Note: This proposal is only valid

until 31 January, 2020

Date: 21-Jul-21 Prepared by: Marketing Agency Name

Hi [Client Name],

It was a pleasure providing our marketing services for you.

Please see the results below for the month of July:

**Website Bookings:** [this could be “sales” if relevant, but in this case, it’s a service business]

Total Bookings: **61**

June Bookings: 55

May Bookings: 49

**Google Maps:** [from Google My Business data]

Total Calls: **91**

Direction Requests: 13

**SEO Ranking:**

“Insurance Broker Melbourne” [just an example]

Google Map: 1st Position

Google Search: 1st page, 3rd Position

“Life Cover Quote Melbourne” [just an example]

Google Search: 1st page, 6th Position

**General Visitor Analytics:**

Total Visitors: 1,130

Average Duration on Website: 2:26 minutes

**Device Type:**

Mobile Phones: 48.78%

Laptops/Computers: 50.00%

Tablets: 2.27%

Bounce Rate: 37%

**AdWords Spend Overview:**

**Totals:**

Total Spent: $1,000

Total Clicks: 212

**Statistics of AdWords Visitors:**

**Gender:**

Male: 58%

Female: 42%

**Age:**

18-24: 6.32%

25-34: 22.29%

35-44: 25.19%

45-54: 17.79%

55-64: 16.51%

65+: 11.90%

**Conclusion:**

We achieved a record month with new bookings (great news!). We’re optimistic for what lies ahead in the coming months as we make SEO improvements.

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| --- | --- |
|  |  |

It was a pleasure providing you with this report.

As always, please let me know if you have any questions, and I’ll be glad to help.

Regards,

Your Name

Contact Number

*AgencyWebsite.com*

Please join these communities below

Facebook: https://www.facebook.com/groups/freelancewebdesignersgroup Use your email for proof of purchase

Slack: Email slack@freelancemastery.dev with your Slack email and include proof of purchase, then we’ll add you to the Slack Community. Acceptance usually takes 24-48 hours during weekdays. Look forward to seeing you inside!