



THE  
**PERFECT CLIENT  
PROPOSAL TEMPLATE**

A complete proposal template to **turn your conversations** with leads and clients **into conversions**.



## ABOUT DIGITALMARKETER

DigitalMarketer combines the largest community of digital marketing pros on planet Earth with the best dang digital marketing training you'll find anywhere.

We're on a mission to double the size of 10,000 businesses and want to help you:

Drive more traffic, produce stellar content, write emails that generate clicks, ...and become the smartest marketer in the room.

If you like what you see, [you can create a free DigitalMarketer Insider account](#) and get instant access to over 30 of our best tools.

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# TIRED OF SPENDING TONS OF TIME CREATING PROPOSAL AFTER PROPOSAL?

Tired of trying to find a format that actually turns into business? Whether you're just getting started or you've been at this for years, the Proposal Template will save you time and help you turn your conversations into conversions. Fill out this template to turn existing prospects into clients and get your existing clients to start spending even more. Use this template as inspiration for your own design, or download the editable document from the end of this guide and customize it for your business.

## WHAT'S THE GOAL?

The goal of this proposal template is to get your prospects and clients to sign on for you to perform your marketing services for their business.

## WHO SHOULD YOU SEND THIS TO?

- Existing Prospects
- Existing Customers

## WHO SHOULD YOU NOT SEND THIS TO?

- Cold Leads





[Your Logo Here]

# **[Business Name]**

*[Proposed Service Title]*

**Prepared For:** [Client Name]

**Prepared By:** [Your Name], [Your Title]

**Date:** [Submitted Date]

# OVERVIEW AND GOALS

Dear [Client Name],

[Open this paragraph with an overview of why it's important for your client to partner with you as a tool for success. Running a business is hard and being a business owner comes with its fair share of challenges, so use this section to explain how you as a partner will be able to alleviate the pressures and challenges that come with entrepreneurship through your services]

**During our sessions, we will discover:** [Insert 4-5 bullet points of what your proposed service will accomplish]

- [Bullet Point 1]
- [Bullet Point 2]
- [Bullet Point 3]
- [Bullet Point 4]
- [Bullet Point 5]

These are the key things that we will focus on and ensure [Goal of proposed services].

We are excited for the opportunity to work with you, and we look forward to your success.

Sincerely,

[Your Signature]

[Your Name]

[Your Title]

[Your Company]

[Your Address]

[Your Website]

# SCOPE OF SERVICES

“

*[Relevant quote that inspires you and your business]*

”

## **[Title of Proposed Service]**

*[Use this initial sentence to lead in to the 3 biggest ways in which your proposed service or services will impact your client's business]*

- *[Impact 1]*
- *[Impact 2]*
- *[Impact 3]*

*[Include a few sentences here outlining your company's philosophy for achieving success in this particular area]*

In this [Proposed Service], we will provide a comprehensive plan which includes:

- [Action Item #1 with comprehensive description]
- [Action Item #2 with comprehensive description]
- [Action Item #3 with comprehensive description]
- [Action Item #4 with comprehensive description]
- [Action Item #5 with comprehensive description]

Upon completion of this comprehensive plan, we will review the recommendations made and prioritize any outstanding tasks or deliverables that need to be completed prior to moving to the next phases, which will include [next steps in completing your proposed services].

## Accountability & Execution Plan

Throughout [Proposed Service], we will be providing recommendations, but what good are recommendations if we don't prioritize or execute? Before we proceed with [Proposed Service], we will identify mission-critical tasks, assign ownership, and create due dates for the tasks so that they are complete. As we build this out, more ideas, tasks, etc. may come up. We have a system to make sure that these ideas are documented and noted so that we can stay on task, but we will revisit these action items as others are completed.

Also note that while we are working through these phases, it is imperative that we get feedback from your team in a timely fashion so that we can keep things moving forward.

# TIMEFRAME

To complete the work outlined in the project scope, we'll need approximately [Estimated Timeframe] from beginning to end, depending on when we receive feedback at each milestone. Upon signing the proposal, we are prepared to start work immediately.

Phase	Day
[Description of phase]	# - #
[Description of phase]	# - #
[Description of phase]	# - #
[Description of phase]	# - #

# YOUR INVESTMENT

Below is the budget we've estimated based on the scope of services outlined earlier in this proposal. If you have any questions about our pricing or need to increase or decrease the scope of work, please leave a comment and let us know.

## Core Budget

Description	Rate	Qty	Price
[Title of Proposed Service]	[Dollar Amount]	[#]	[Dollar Amount]
[Title of Proposed Service]	[Dollar Amount]	[#]	[Dollar Amount]
Total Cost			[Dollar Amount]



## WHY US?

*[Use this section to explain what separates you as a company and how your actions will position you as the preferred business to help your clients solve their problems]*



[Your Address]

[Your Website]

# TERMS

**Date:** *[Date Submitted]*

**Between “us,” [Your Company], and “you,” [Client’s Company]**

**You [Client’s Company], are hiring [Your Company] located at [Your Address] to perform consulting and coaching services for the estimated total price of [Cost of Services] as outlined above in our fee schedule.**

*[Place your company’s terms and conditions here]*

# **NEXT STEPS**

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- 1. Please read the contract on the previous page to make sure you understand all the details involved with us working together. It's really important to us that everything is transparent and understood from the beginning so that we lay a solid foundation for a great working relationship.**
- 2. If you have any questions at all, please let us know.**
- 3. Once you feel confident about everything and are ready to move forward, please sign below.**
- 4. Once we receive notification of your acceptance, we'll contact you shortly to sort out next steps and get the project started.**
- 5. We'll email you a separate copy of the signed contract for your records.**
- 6. If you'd like to speak to us by phone, don't hesitate to call [Your Phone Number].**

---

[Your Name]

[Your Company]

---

[Client Name]

[Client Company]

[Your Address]

[Your Website]



**Download the Editable  
Proposal Template**

# WHAT'S NEXT?

Now that you have the framework to turn prospects into clients, you're ready to [take your business to the next level!](#)

If you're ready to get more clients, improve client retention, and generate more passive income from the clients you already have, DigitalMarketer is here to help with our [Certified Partner Program](#). We want to double the size of your business so you can do the same for your clients.

So, if you're serving small businesses, then we want to serve you. Let's start a conversation today about becoming a [DigitalMarketer Certified Partner](#) and get the tools and training you need to double your client's business and your own.

## THE PARTNER SUCCESS PLAN

A PROVEN PROCESS FOR DOUBLING SALES



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