**How to Use this Template**

A social media proposal formalizes your ideas to your client. It’s not a contract (though it can be if you want it to be). This stage often comes after a consultation or research on the client’s needs.

Let’s say you want to change up the look of your kitchen. You have a general idea of what you’re looking for, but you don’t have the knowledge to make your dream kitchen come to life. Your next logical step is to hire an interior designer and if you do your due diligence, you’ll find a few people who might have the experience you need. You’ll ask for proposals and after looking at what they send you, you’ll make a decision.

The tricky part of writing a proposal is that you need to persuade the client of your abilities without outlining every step.

An interior designer won’t send you three different kitchen designs, complete with sample materials in their proposal. Nothing could stop you from taking their design and executing it on your own. Instead, the designer would need to demonstrate industry knowledge and an understanding of your needs. Based on their recommendations and their portfolio, you’ll be able to make an informed decision on hiring them.

This document arms you with all of the information you’ll want to send a potential client to land the deal.

Some of the major proposal components included here for you to fill out prior to sending to your prospect are:

* Analysis: identification of the client’s problems
* Scope of work: your solution to the problems
* Project milestones and deadlines
* Proof of work
* Terms of agreement
* Next steps for the client

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| --- | --- |
| Sprout’s social media marketing platform empowers teams of all sizes to align on content creation, campaign management, engagement and reporting initiatives.  [Learn more about our social marketing solutions today.](https://sproutsocial.com/social-media-marketing/?utm_source=hubspot&utm_medium=partner+program) | Learn how to integrate your social media strategy into the rest of your marketing funnel. Schedule your free Inbound Marketing Assessment with HubSpot today.  [Get your free inbound marketing assessment.](https://offers.hubspot.com/inbound-marketing-assessment?hubs_campaign=hscm-sprout-social&hubs_content=templates) |

**[Social Media Project Name]**

02.22.2017

**─**

**Your Name**  
Your Company or Organization   
123 Your Street  
Your City, ST 12345  
Phone  
Email  
Website

1. **Overview**

Clearly detail your social media proposal’s ultimate goal and duties expected from both parties. There’s no need to go into specific detail in the overview, but instead save it for the following section.

1. **Social Media Goals**

Ensure your goals include how you plan to **identify** the client’s problems and how you will **solve** them. Additionally, you should include details into *why* the original social plan didn’t work. For example, here are some common goals:

1. **Increase sales:** What KPIs will you be measured on for your work? How will your social goals link to the company’s bottom line?
2. **Increase traffic:** What tools will you use to measure traffic? How will you prove your social strategy relates to site traffic.
3. **Increase Engagement:** Why wasn’t the previous plan working? How will you plan to engage the customer’s clientele? Is there proof or reason behind this?
4. **Project Timeline**

Once your current or potential client reads the overview and goals, it’s time to deliver your timeline. State the entire timeline of the project and how both sides (whether it’s through mutual agreement) can extend or shorten the campaign. If needed, give a specific timeline outlining each goal.

1. **Scope of Work**

Here you should detail everything you plan on doing for the client in clear-cut detail. Break this section into smaller pieces to clearly and effectively identify your entire scope of work. This can include:

* **Posting Schedule:** Which networks are you going to be monitoring and how often will you be posting? If a posting approval process is needed, then be sure to outline what that would look like.
* **Content Creation and Curation:** This can include creating a social media content calendar, taking photographs and keeping a pulse on industry news.
* **Brand Keyword or Hashtag Monitoring:** Be sure to note which keyword(s) or hashtag(s) you will be tracking.
* **Analytics and Reporting:** How often will you be reporting on analytics and what will you be tracking?
* **Social Media Management Details:** When will you be available to engage on social media? How much time will you be dedicating to the client?

1. **Project Milestones & Deadlines**

This section will clearly define how you measure a project’s success. If the client wants more brand exposure from social media, you’ll likely identify impressions and reposts to be part of your metrics. With their current numbers and growth rate in mind, you’ll be able to write reasonable, numeric goals in the proposal.

For example, some of the milestones could include:

1. **5% Web Sales Increase by End of Q3 2017**

Make sure you provide a solid (obtainable but actionable) figure, which goal it will align with and the deadline you plan to reach.

1. **6-Month Boost in Instagram Engagement Ratios**

You can use social media analytics tools like Sprout Social to measure engagement ratios to ensure you’re reaching and interacting with more customers per month and have the data the back up your milestones.

1. **Launch Campaign by March 31, 2017**

Include your campaign stages such as kickoff, creative approval, launch, monitor and review. This will help create a timeline for your client and help you stay on track.

1. **Proof of Work**

Why should you be the one to work with this client and not your competitor? What makes you stand out from all the others? Chances are that the client is receiving multiple proposals for the same project.

This is where you demonstrate how your experience would fit into their needs. It can come in the form of client testimonials or examples of how you’ve successfully managed clients with similar goals.

1. **Terms of Agreement**

This is the nitty-gritty of the proposal. The section should clearly communicate how you work and what the contract terms would be. It can include important items like:

* **Fees:** project, hourly or retainer, content, infographics, etc.
* **Billing practices:** how you invoice, what your payment terms are or if you require a deposit
* **How you work:** remotely, in the client’s office and when you’re available to answer questions
* **Termination:** how to end the project if either party decides it’s not for them

1. **Payment Schedule**

Clearly identify your payment schedule with how you plan to work. It can be intimidating to see the full price up front in a single number. Break down your payment schedule to show your client how it works:

|  |  |  |
| --- | --- | --- |
| **Due Date** | **Process** | **Amount** |
| 3/1/17 | Goal 1/Milestone 1 | $XX |
| 4/1/17 | Goal 2/Milestone 2 | $XX |
| 5/1/17 | Campaign Completion | $XX |

1. **Points of Contact**

In addition to the campaign, you will want to provide points of contact to where the vendor will receive weekly or bi-weekly updates on the project. Make sure to fully list your primary contacts as follows:

* [Job Title–Starting With Your Most Senior Staff]  
  [First and Last Name]  
  [Job Experience and Role in the Campaign]
* [Job Title–Second in Command]  
  [First and Last Name]  
  [Job Experience and Role in the Campaign]

1. **Next Steps**

To avoid limbo and a continual back-and-forth between you and the client, write down what happens after the proposal is sent. Will you be following up after a certain number of days? Does the client have a chance to ask for revisions on the proposal?

Some agencies like to include an expiration date on their proposals along with a copyright notice. Proposal length can vary depending on the client you’re working with. A proposal for a small business would look remarkably different from a proposal for a multi-million dollar company.

[Signature]

**Your Name**  
Your Company or Organization   
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Your City, ST 12345  
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