

# Persuasive CRO Proposals

How to Write Persuasive  
CRO Proposals

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**When you got started in the conversion rate optimization industry, writing proposals probably wasn't what you had in mind.** In fact, if you're like most, you probably dread writing and submitting a proposal to a new potential client. Sitting down to write is the last thing you want to be doing, but unfortunately, you have to do it. As a CRO expert, your ability to land a new project is almost entirely dependent upon your ability to write a convincing proposal.

The right pitch lets your potential client know what you can do for them, why they should hire you, and then convinces them to take the steps to do so. But it's not something the majority of us are born knowing how to do. Chances are you'd much rather spend your time marketing for the client, not yourself.

Unfortunately, that's not how it works for most clients.

If you want to land the big clients, the ones with the biggest budgets, then you need to write a top-quality proposal.

While writing and submitting proposals is an unavoidable part of being a CRO expert, you don't necessarily have to make it a painful, time-consuming process. Instead, you can learn to write better proposals more quickly.

Impossible? Not really. You can create a proposal writing system to easily format and write out your proposals, and in so doing, remove the vast majority of the manual labor. You get better proposals, and more free time for analytics, A/B Testing, and all the other tricks of your trade.

Take a few minutes now to learn about writing top-quality proposals and you can save valuable time later. **Once you see how easy it is to systemize your own proposals, you'll be able to create better proposals more quickly and get started converting the clients you want!**

Ready? Let's get started!

# The Anatomy of a Persuasive Proposal

## 5 Essential Elements Every Proposal Should Have

You don't have to spend the same amount of time or research as you would on a marketing strategy, and that's the point. Each proposal will vary in content and length depending on the project requirements, but you can save time by following a basic proposal structure.

**Any CRO proposal should include five basic elements, regardless of its size, length, or the complexity of the project.**

## **1. The Problem Statement**

Any proposal has to tell the prospective client that you understand their issues. This is known as the problem statement, and it should be the first part of your proposal.

**While anyone can write a problem statement, it takes research to write a good one. An attention grabbing problem statement goes below the surface veneer of “what the project requires” and talks about “what the client needs”.**

Sound complicated? It's not. It's a simple matter of recognizing the actual issue.

Let's say you're writing a proposal to a prospective client in search of someone to optimize their website's conversion rates. You know that they need someone to improve their conversion rates, but is that why they are hiring?

Any client, no matter how big or small, is going to be trying to make money. They won't hire you to do conversion rate optimization just for the sake of optimizing, they want ROI. They are in business to make money.

This is where your problem statement comes in. **Why does your client need a CRO expert?**

Your problem statement has to address this issue before you can get on with your proposal.

Let's take a look at a few quick examples:

*ABC Company is looking to start increasing the conversion rates of the traffic they currently have on-site while attracting new subscribers. The updates should be well researched using A/B testing and documented analytics.*

Here the CRO expert explains what's needed and what is expected from the campaign. This problem statement explains the 'surface' requirements of the client. It's not a good problem statement because it doesn't do anything else.

In fact, this problem statement might as well be copied and pasted from whatever the company posted to begin with. Most importantly, this problem statement doesn't distinguish itself by telling the client what they really need.

**Bottom line: this problem statement doesn't answer the real issue.**

Now, what if you took the basic problem statement and upgraded it with real information.

*ABC Company has recently begun using PPC as part of their traffic generation, but visits from the current campaign aren't converting properly. While a great deal of consumers are clicking through on ads, very few of them are taking the leap and making a purchase.*

*ABC Company needs someone to optimize the landing pages and website to appeal to a targeted demographic of consumers more likely to purchase.*

*The campaign should include A/B testing, heat mapping, and demographic research to improve the conversion rate of the landing pages so that ABC Company sees a direct ROI.*

This problem statement is a great deal more eye catching for a number of reasons. First, it starts out by outlining what the client needs, ads that offer ROI. It shows that you understand what the client needs, not research but approval. They don't need you to optimize their pages; they need you to make them money. By including this information in your problem statement, you grasp

your potential client's attention and tell them that you understand them.

**Most problem statements aren't quite this easy. You'll probably have to research why the client requires CRO.**

Many clients won't communicate these issues to you, mainly because they'll just assume you're on the same page.

Finding the real issue that is driving your client to make the hire is important for making your proposal stand out. By making sure that the information is at the beginning of the proposal, you help ensure that they keep reading.

***Why does your prospective client really need a CRO expert?***

Answer that question in your problem statement, and you start your proposal off on the right foot.

If you can answer that question at the beginning of your proposal, then you're on the right track.

If you think you've got that down, keep reading.

## **2. Your Proposed Solution**

Now that you know what the actual issue is, you have to solve it. It's time for you to let the prospective client know that your services are the best solution to their problem.

## **How can you use your CRO services to solve your client's problems?**

There are dozens of CRO experts; the client could hire any of them to improve their conversions. Why do they want to hire you? What solutions do you offer?

## **Your conversion optimization services are important, but not as much so as your ability to provide direct ROI.**

Your clients have to improve their ROI by increasing their conversion rates, and because they can't do it themselves, they need to know who can do it best. Just describing what your skill set is usually doesn't do the job. Connect your prospective clients needs with your services and outline the results to produce a better proposal.

Here's a quick demo:

*We recommend a new landing page approach with better call to actions and more targeted content that are less likely to induce random clicks. The new landing pages would promote more organic search volume, lower PPC ad cost due to more targeted content, and in-turn convert more sales and conversions due to more targeted material. The pages would also be analyzed, tested, and improved to increase conversions over time.*



This doesn't tell you anything new.

The person using this solution is actually hurting their chances of success because they aren't' actually offering a solution. They're just offering skills.

**This proposal doesn't sell your results.**

Most importantly, it doesn't connect any dots. It does nothing but say what the marketing campaign would include.

Now consider if you were to write it this way?

*In order to improve conversion and therefore ROI, ABC Company has to introduce a more targeted ad campaign. The ads would be targeted towards specific users, and designed to appeal to consumers not the masses.*

*The campaign would be designed around specific company goals and hopeful sales figures and then launched with the new ads targeting the company's prime demographic. The campaign would also include direct analysis and A/B testing to improve conversion and sales over time.*

See that? **The CRO takes the time to describe what his services solve, how it works, and what happens over time.**

Although this solution is a lot harder to write and does require more research, it's also a lot more informative. Instead of saying, "this should be done", this solution says, "This should be done and this is what it will do". It exhibits forethought, awareness of the client's issues, and real potential for results.

**Tell your clients what you can do for them in terms of solutions, not skills.** By connecting the dots, you make your skills and resources seem that much more valuable because you can actually help them.

### **3. Benefits**

The follow-up to your problem and solution should be to explain why your services are best for your client. You wouldn't write about a marketing strategy without listing its results, and you shouldn't leave benefits out of a proposal either.

So what if you put a lot of work into your proposal already. Your client will see that you know what you're talking about and hire you right?

Most of the time that's a no.

You're not the only fish in the sea. Your client may have already received dozens of similar proposals. Why should they pick

yours? In fact, your client might not even fully understand the scope of your solution.

You're the professional CRO and there's a reason they need to hire you to do their optimization. Unfortunately, the client might not actually know anything about marketing, let alone optimization. So they might not even know how your services will improve sales, let alone produce ROI.

**While the benefits of your services and resources are obvious to you, your client might be completely ignorant of how you benefit them.**

You can't expect any prospective client to know what you're bringing to the table. You have to *tell* them.

The benefits portion of your proposal gives you the opportunity to write a convincing reason that you are best suited to solving your client's issues.

**What do you bring to the table?**

Let's take a look at this example:

*We'll begin by doing an analysis of your CRO, making an outline of what has to change based on current data, and then get to work creating newer, more targeted landing pages. We'll work with your current marketing team, or with you, to create*

*content that appeals to potential consumers in order to decrease non-converting clicks.*

*We'll create a marketing strategy based on your long-term goals, and then create an landing page strategy based on those goals. We'll also target keywords, search terms, and ad content towards your target demographic in order to increase sales. Finally, we'll A/B test our pages with different variations and keywords so that we can constantly improve and increase your ROI.*

By taking the time to highlight why you're better than the competitors, you make yourself stand out. In this case, you've outlined that you can make them more money, improve their click through rate, and decrease clicks that don't turn into sales. Make sure you outline what [separates yourself from your competitors](#). You'll make your proposals more persuasive, and you'll give people actual reasons to hire you.

## **4. Pricing Information**

Now that you've talked about what you're offering and why it's better than your competitors, you have to answer another question.

*Does this fit in the budget?*

A higher budget isn't going to mean automatic denial, unless you're marketing for a very small business but a confusing price section probably will.

**Make your pricing schedule easy to read and understand or your client won't know what they're getting for the money.**

Organization your pricing properly is an essential part of creating a winning proposal.

Luckily, creating an easy to understand pricing section is easy. Just use a grid format to lay everything out. Like this:

<b>Optimized Landing Pages</b>	<b>\$5,470</b>
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**Initial Meeting**– We'll meet with you or your marketing team to discuss your current efforts, long-term goals, and consumer demographic. We'll use this info to create a marketing strategy for your business.

**Campaign Launch**– We'll create new, high-conversion landing pages and launch them to get you started. We'll ensure that every page is targeted towards the correct consumer demographic, and analyze results to improve sales.

**A/B Testing**– We'll constantly analyze, split test, and change your pages to increase performance and conversion.

**Project Total            \$5,470**

Notice how this initial pricing estimate is easy to read and understand? Unfortunately, you can't use this pricing system every time. Many companies and prospective clients will already have listed a budget in which they want you to work. A budget summary, as listed here, works great for smaller or short-term projects.

No matter how many stages to your budget plan, try breaking it down at a high level to avoid confusion.

If you're worried about your bid, check these [psychological price hacks](#) to see how a higher budget doesn't necessarily mean scaring your client away. You can learn to present yourself as offering more value for the services to get better rates.

The pricing information section is usually known as a "Budget Summary," but can also be called 'Budget' or 'Bid Summary', depending on the project.

If you expect to receive milestone payments of any kind (such as at the end of each month) then you need to include a budget schedule instead of a summary, which is longer and more complex. In this case, you do want a more detailed analysis of pricing, such as how much is due each month, but remember to keep it simple.

## 5. Call to Action

You wouldn't want to persuade your prospective client to hire you and then leave them to go about their day and forget about you.

It happens more than you might think. Someone will write a killer proposal, the client intends to write back to them, but then they get distracted, they get a phone call, or a budget meeting doesn't go well. They forget about your proposal and you never hear from them again.

**A call to action increases your conversion rate because it asks the client to do something. It asks them to take action.**

This seems like an obvious include when you think about it, but a surprising number of CRO experts leave it out. Unfortunately, you can't expect clients to take time out of their busy day to look for your contact information.

The people that you're contacting with your proposal don't have the time or the energy to put work into hiring you. You have to make it easy. *Ask* them to contact you, and give them the means to do so.

Your call to action should include information on how to move forward with their project, how to contact you, and it should be as easy as possible.

Here's an example:

*To proceed with the marketing campaign,  
ABC Company should do the following:*

- 1. Call us at (xxx-xxx-xxxx) to accept the campaign as is or discuss desired changes or specific terms.*
- 2. Finalize and sign contract.*
- 3. Submit initial payment of first month's payment towards the total project budget.*

*Once these steps have been completed we will begin the project with a kick off meeting to discuss project timelines, marketing strategy, and your demographic.*

Here you tell your prospective client exactly what they have to do if they want to move forward. In this case, all they have to do is call you to agree to the contract or discuss terms, sign the agreement, and then pay you. You've also followed up with a quick intro to what will happen after they accept so they know what they're getting.

Including a call to action makes it easy for clients to take that final step and actually make the hire. Don't write a proposal without it.



# Putting It All Together

## Structuring a Persuasive Proposal

So far we've talked about the different elements of a proposal, but now it's time to learn how to put them together. Each of the elements we've discussed fits together to create a basic proposal structure that you can use as a template.

That structure looks like this:

**1. Problem Statement**

**2. Proposed Solution**

**3. Benefits**

**4. Pricing Information**

**5. Call to Action**

You can also go with a few alternative name options. Depending on the size of your client, the type of project, and the length of the project, you may want to go with one of the following:

**“Problem Statement”** can also go by “Client Needs,” “Client Goals,” “Client Objectives,” or “Goals and Objectives.”

“**Proposed Solution**” can also go by “Recommended Solution”, “Recommended Strategy”, or “Recommended Action”

“**Pricing Information**” can also go by “Budget Summary” (for shorter projects), “Budget Schedule” (for longer projects), or “Project Budget.”

# Making Proposal Writing a Repeatable Process

## Turning It into a System

No matter how much you hate writing proposals, it would be foolish to avoid them entirely. Most of your clients aren’t even going to think about hiring a CRO expert without a proposal.

Your proposal is your chance to get attention, suggest that you’re the best option for the job, and concrete your chance of getting the project. **A winning proposal tells your client that you’re worth the budget, that you deliver, and that you are the best CRO expert for their needs.**

While you can’t avoid writing proposals, you can make it easier by taking the basic structure and creating a system. Essentially, you’re automating some of the manual tasks to make writing a proposal faster.

Your best option is [proposal software](#), which will create a system for you and offer prompts for content. Using software is the fastest and easiest way to go.

Software also includes professional templates that you can apply with the click of a button, which is definitely faster than creating your own. Using a professional design makes your proposal look that much better, which means you have more persuading pitch.

If you can't use the proposal software from Bidsketch then you can try using proposal templates instead.

## Creating Your Own Proposal Templates

# A Manual Alternative to Proposal Software

Creating a template will help you to streamline your proposal writing process, even without software. While not as effective as software, it is a lot faster than doing each proposal manually.

Microsoft Office is the most popular solution for business proposals, but [OpenOffice](#) is a popular alternative. To get started, you will want at least one template for short term or low budget proposals and one for long term and complex projects.

Ready? Let's cover that now.

## Small Proposal Templates

A small template is ideal for short marketing campaigns, optimizing for an existing team, and anything that really covers a very short-term project. You might not even need this one very often, but it is useful to have around, especially if you like to bid on projects that you can complete quickly.

This sort of template should be perfect for a 2-page proposal, which is great for smaller projects. You don't want it to be too long if the project isn't that complex. Essentially, it's the short but sweet version of your normal proposal template.

Microsoft Office offers [basic instructions](#) for creating a template in Microsoft Word. OpenOffice also offers their own set of instructions [here](#).

### **Here's a basic structure for the small proposal template:**

- **Client Needs** (problem statement)
- **Recommended Solution** (proposed solution)
- **Benefits**
- **Fee Summary** (pricing information)
- **Next Steps** (call to action)

## **Large Proposal Templates**

Most CRO projects are longer and more involved so this is the template that you will use most often. A 'large proposal template' covers a little more detail, includes more information, and is usually right around four to five pages in length.

This template is perfect for most of your basic projects.

### **Here's a basic structure for the large proposal template:**

- **Goals and Objectives** (problem statement)

- **Recommended Solution** (proposed solution)
- **Benefits**
- **Fee Summary** (pricing information)
- **Fee Schedule:** outlines different points where you'll receive partial payments or milestones of the total project cost for completed work
- **Estimated Project Schedule:** gives prospective clients an estimated timeline for reports and results. You don't want to offer any concrete data delivery, just reports and updates.

Here's an example project schedule from a [free web design template](#):

## Project Timeline

We offer the following timeline for the development of an original corporate identity and marketing package:

Phase	Activities	Completion
Discovery	Analysis of Highwire Snowboards Inc.'s design needs and preferences.	09/30/XX
Logo Development	Three concepts in rough draft, one concept in two color schemes and the final logo.	10/19/XX
Business Card Development	You will receive the following: <ul style="list-style-type: none"><li>• Two concepts in rough draft</li><li>• One concept in two color schemes</li><li>• Final business card design</li></ul>	10/30/XX
Brochure Design	Three concepts in rough draft, one concept in two color schemes and the final brochure.	11/07/XX

- **Next Steps** (call to action)
- **Terms and Conditions:** these are important to ensure you get paid and to set client expectations if legal issues arise. The terms and conditions should also highlight an NDA(Non-disclosure agreement).

Here is a sample Terms and Conditions section from the sample CRO proposal template below:

## Terms and Conditions

- Once project fee is paid in full to Bidsketch any elements of text, graphics, photos, contents, trademarks, or other artwork furnished to Highwire Snowboards Inc. for inclusion in website are owned by Highwire Snowboards Inc..
- Bidsketch assumes Highwire Snowboards Inc. has permission from the rightful owner to use any images or design elements that are provided by Highwire Snowboards Inc. for inclusion in the website, and will hold harmless, protect, and defend Bidsketch from any claim or suit arising from the use of such elements.
- Bidsketch retains the right to display graphics and other Web content elements as examples of their work in their portfolio and as content features in other projects. Bidsketch also retains the right to place a text link on the bottom of every page.
- This agreement becomes effective only when signed by agents of Highwire Snowboards Inc. and Bidsketch. Regardless of the place of signing of this agreement, Highwire Snowboards Inc. agrees that for purposes of venue, this contract was entered into in WA and any dispute will be litigated or arbitrated in WA.
- The agreement contained in this contract constitutes the sole agreement between Highwire Snowboards Inc. and the Bidsketch regarding all items included in this agreement.

*Note:* You definitely want to create your own terms and conditions based on the specifics of your project and the NDA requirements. Stipulating that payment is required campaign isn't successful. If you're unsure about the language, consider running it by your attorney first.

**Long proposals should be roughly twice the length of short ones.** Keep in mind that you want to set client expectations and deliver the right information without boring them. Just stick to the details and be as succinct as possible, and your proposal should be 4-5 pages long.



# Making It Look Professional

## First Impression Is Everything

Design may not be your profession, unless you also create landing pages, but design does exhibit professionalism. Your proposal presents you to the prospective client and first impressions are everything.

As a CRO expert, you want to establish yourself as a professional with high quality standards and an eye for detail.

**And your proposal is how you get that across.** Your proposal is most likely the first time you contact the prospective client, and it's your one chance to make a perfect impression, unless you don't.

Your proposal should look as professional as you are, and if it doesn't, it's going to detract from your pitch. Layout, design, and style are all important elements of a compelling proposal, so make sure you include them.

If you're using software this isn't an issue. If not, then you have to figure out how to make your presentation stand out on your own.

## 1. Elegant Design

An elegant design is the best way to make a good impression on your prospective clients. Elegance shows that you're a professional, and that you understand what people like.

Unless you're also a graphic designer, you're probably going to want to spend a few bucks on an elegant theme for the header and footer. Look for something understated but creative for the best effect.

**Don't Try Too Hard** – Impressing clients is great, but you don't want your design to scream 'look at me'. The most important part of your pitch is still the content.

## 2. Helper Text

If you aren't using Bidsketch proposal software to create your proposals then you'll need something to help you out with content. You're not going to remember every element and all of the content that goes into a proposal at first, and you shouldn't have to.

Instead, try using placeholder or helper text to fill out your template. You can use this as a creative guide for writing and formatting your own proposal. Over time, you'll get better at doing this on your own, but at first you should probably go with the helper text.

A quick set of examples and guidelines can save you time while ensuring that you include all of the right information in your proposal.

**If you need examples, try copying some of the information from the Anatomy of a Persuasive Proposal section to get started.**

**Watch out!** Leaving your placeholder text in the proposal is a sure way to lose your bid. Try removing the placeholder text as you go, and then re-read the whole thing to make sure that you've taken it all out.

You'll also want to make sure that you avoid general terminology and filler content that doesn't really apply to the specific project. By ensuring that your content only covers your client's needs you make your proposal unique, and much more likely to be noticed.

**If it doesn't directly describe the client's situation, problem, or requirements, it doesn't belong in your proposal.**

The result is that your proposals are short, to the point, and 100% relevant to the client you happen to be pitching. Plus, by keeping content focused, you'll sound like you put way more time and energy into the proposal.

### 3. Should I Say Something about My Company?

Sometimes you have to talk about yourself, but the truth is that that time is not always in your pitch. While you may think that you're helping yourself by creating a list of big companies you've worked with in the past, you might be wrong.

The majority of clients only care about you to the extent where you can help them. Most of the time, they really don't want to hear about you working with their competitors.

**Your persuasive proposal outlines how you can add value to the project, you don't need an about statement.** (I.E. your problem statement, proposed solution, pricing information, etc.)

On the other hand, you can include a link to your [website or portfolio](#) to allow interested clients to pursue you further. If they want to know more about you, a website is the perfect place for them to find what they want to know.

**If you do decide to include a “Company Info” section, do it after your pricing section.** It is up to you if you want to include information about yourself, but placement is key.

Talking about yourself when the client wants to know how you can help them is a sure way to reduce the impact of your proposal. Clients most likely aren't interested in you enough to read through it.

The best place to put an about section is at the end of your proposal. This allows clients who have read through the rest of your proposal the chance to get to know you. And the ones not interested can just skip it.

## Tools, Resources, and Next Steps

Hopefully you have a better understanding by now of: 1) what a compelling CRO proposal looks like; 2) how to create one that will separate you from your competitors; and 3) how to make proposal writing as painless and efficient as possible by turning it into a system.

**You'll have to keep writing and submitting proposals—that's just the name of the game—but you can make it easy to get them out to clients quickly and save you time and trouble.**

The easiest way to do this is to use [Bidsketch proposal software](#). This gives you the structure and presentation you need to get your proposals out quickly and effectively.

You could also follow the directions above to create your own proposal templates manually. It'll take a time investment, but you'll set yourself up for more free time to focus on clients going forward.

If you are going the template route and don't quite know where to get started, we offer a number of [free example proposal templates](#). You can model one of them or use it for a little inspiration to get started.

Another thing you can do to help grow your content optimization business is to check out [the Bidsketch blog](#). There's a ton of free, actionable content available—whether it's about negotiating higher rates with clients, being more productive, or marketing your research or lab—and we update it often.

Finally, if you haven't done so already, hop on to the Bidsketch email list. You'll receive a free eBook about marketing strategies to get more clients, along with fresh new content delivered straight to your inbox as soon as it's released.

**Best of luck in creating winning CRO proposals!**