THE
PROPOSAL CHECKLIST

» Make sure the proposal is a summary of everything you have discussed with your client up to this point.

» Proofread everything twice before sending.

» Never send a proposal the same day as writing it (if possible). Give it time to sit. You will undoubtedly want to make changes the next time you read it.

» Use your own voice and incorporate language used by your client.

» A proposal should be about the client, not you. *There's no "I" in proposal.*

» Focus on the why, not the how. **WHY** should this project go ahead? Not **HOW** should this project be carried out.

» Iterate your client's problem throughout the proposal. It will show you have **understood** their needs and that you have **truly listened**.

» Don't pitch yourself as a technician. You solve business problems.

» Offer several pricing options. Give your client a choice.

» Price anchoring: By giving your client a basic, intermediary and

premium pricing package, the choice becomes *"How much do I want to pay?"* not *"Who do I want to pay."*

» The more time you spend courting a client, the greater your chances of them accepting a proposal are.

» Keep it simple. *"Design"* should only ever support the end goal. *Keep the focus on the content of the proposal.*

» If a proposal fails, follow up with the client. Ask them why it didn't work for them. It will help you to avoid making the same mistake in future proposals.

» Make it clear that by working with you your client's business will be better off. If you can't promise a better tomorrow, why would they want to consider you?

» Make sure you have all the information you need. Dig deep in those initial client meetings. Ask why, **a lot.**

» Freelancers have the unfortunate reputation of being a flaky bunch. A well-researched, well-written proposal will put you ahead of the rest.

» Turn your initial client interview on its head. Listen, but also make

sure you ask the right questions. It's up to you to learn why this project is being undertaken and what it will mean to the client should it succeed or fail.

» A proposal is not a standalone product, without a prior relationship you'll be playing a numbers game.

» Areas a proposal should address:

This is what I know about your business.
Here's why the project needs to happen.
This is my proposed solution(s), which shows my understanding of the problem.
Which leads into why I'm the right person for the job.
Tiered pricing options (or pricing of your choice).
Added bonus for creating urgency...limited schedule etc.

» Selling a proposal to an existing client is infinitely easier. A small sale prior to them becoming a *"project"* client can come in the form of an ebook, a paid roadmapping session, discovery phase or site review. There are options...

» Tiered pricing is an opportunity to upsell a client on services that

they perhaps hadn't considered.

» Throughout the proposal, reflect the client's problems and needs *in their own words*. They will identify with the proposal and think, *"They understand me!"*

» Divide your proposal into sections, clients expect them. Keep each section clear and concise.

» Keep stories for your blog.

» A proposal is much easier to sell when it reflects an existing relationship between you and your client.

» You can include an *About Us,* but remember it's never about you. Focus on the client; their needs and how you can help make their lives/businesses better (even in the About Us).

» If you focus on yourself, your talents and technical capabilities, you portray the image of someone who hasn't spent enough time getting to know their client.

» Tackle the issue of trust and *"Who am I"* **before** getting to a proposal.

» Your tools do not define you. Solve a problem first, and *then* use your tools to conquer that problem.

» *"Where I live Branding is something that happens to cows."* Be clear and use language that your clients will understand (quote from one of the book's accompanying videos).

» If your pricing is complicated you will lose trust. Clients will presume you're out to rip them off.

» Don't cave on pricing. If a price is out of reach for your client, try reducing the scope first. Dropping your prices *"just because"*, undervalues your service and credibility.

» Be prepared to walk if it's not going to work out. Recommend a freelancer who can help them. It's good to be play suitor.

» Coming in too low can be as dangerous as coming in too high. As strange as it might sound, big companies with big budgets *want* to spend more money. If you had money in abundance, would you rather buy a Mercedes or a Kia?

» Don't sell your tools; sell solutions.

» When a proposal is done just right your client will scream, *"What can I move around to (afford) work with this person."* Not, *"How can I find this cheaper."* (quote from one of the book's accompanying videos)

» A proposal is a reinforcement of all the groundwork you've put in up to that point. It's the dot on the i.

» A proposal cannot live on its own. Without a prior relationship with your client you'll be playing a numbers game. Someone will always work for less than you, **guaranteed**. Don't let it be about the numbers.

» Give your client the option to spend more money (upsell). If you don't give them the option they never will.

» It's only by understanding the motivations of your client can you provide a truly valuable solution.

» No matter how many (pricing) options you provide, don't let *"going elsewhere"* be one of them.

» Before sending any proposal, email it to yourself. Get a feel for how it looks in your inbox (with its Subject Title) and how it reads (quote from one of the book's accompanying videos).

» Nothing is set in stone, **experiment with everything!**

This is a free excerpt from **The Designer's Guide to Proposals.** You can pre-order your copy here:

nathanpowell.me/proposals

If you have any questions or comments about the book, drop me a line and I'll be sure to get back to you.

Good luck!

nathan@nathanpowell.me