Proposal to Contract: How to Seal the Deal Without Giving Away Your Time or Content

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8 minute read

Turning a prospect into a client takes time.

One step along the way is creating a compelling proposal to help you land the job.

But it's important to make your proposal compelling without giving your prospect a detailed blueprint to carry on without you. You want to showcase your skills and creativity, yet you don't want to give away your time, ideas, or content for free.

So how do you strike the balance?

When I was starting out, I was invited to a meeting at an entertainment PR and marketing agency. I was hitting it out of the park with great ideas that came to me as they outlined the scope of their project. I answered a lot of questions. In retrospect, I realize I provided quite a lot of detail on how I would execute my vision.

I left that meeting with wings on, expecting a hefty retainer and a dream team to work with. And then… crickets. My calls and emails went unanswered. The prospect ghosted me. But that wasn't the worst of it…

I began seeing snippets in publications and on the company's platforms that were eerily familiar — because they were mine. They reaped success from what I had inadvertently gifted them.

Was I bitter? You might say as day-old coffee.

Now, before you freak out, please know this scenario is blessedly rare. Many writers have never experienced anything like this, and it's happened to me only the one time.

But once was enough! Which is why I'm going to show you how to avoid such situations.

Fortunately there are ways to produce a powerful proposal that shines a light on your value while safeguarding your intellectual property.

It was a no-brainer to ask Marketing Mentor **Ilise Benun**, the Proposal Queen herself, to weigh in. I blasted her with a firehose stream of questions, including these:

- How much detail should you share with a client in the initial discovery call and proposal?
- How do you provide a proposal compelling enough to win a job without giving away your best ideas?
- Have you ever been taken advantage of in this situation?

Benun freely admits that how much detail to share with a prospect before having a contract can be a fuzzy area, one that varies with each individual's business style. However, there are actions she endorses before you begin drafting. (Ilise has never encountered plagiarism like I did, so I'm paying serious attention.)

Get real

Entering into any business relationship, Benun advocates for being your authentic self. "Your proposal is a selling document. The contract is a buying document. You are selling yourself and your personality just as much as your unique take on a prospect's needs. It's not just okay to do this — it's the way you procure that contract and land more quality clients."

Because of this, it's important to go into your discovery call as relaxed as you can. You want to be professional, but you don't want to be dull or boring or overly polished. As much as possible, be yourself. Share your experience that are relevant to the call. Let your humor come through. These same strategies apply to your proposal.

The key to doing this is to detach from the outcome. Don't worry about the result of any one call or proposal. Be curious. Think about how you would solve the client's problem. Enjoy the process. But don't worry about whether you'll close the deal. There will always be another opportunity.

To learn how to become your best marketing tool while being yourself, check out Profit from Your Personality, a bundle created by Benun and collaborators Danielle Hughes and Lisa Mullins.

Proposal prep work

Benun recommends conducting research before interacting with a prospect whenever possible. That way you can identify those likely to result in a good working relationship.

Some writers prefer pre-screening before they agree to a conversation. Pre-screening can be done via a form and questionnaire on your website or through email as the first point of contact. You can get an idea of your prospect's marketing knowledge, budget, project size, and other parameters important to you. You should also visit their public platforms to learn more about their business. Having this knowledge better prepares you for a conversation, and helps you decide whether to move forward.

Talking points

Benun explains that a qualifying conversation, the oft-offered free consult, and a discovery call are basically all the same thing. It is the initial call with your prospect (usually free of charge) to determine whether you are a good fit for each other.

Many new writers seem to skip over the part about whether a prospect is a good fit for them. You don't have to say yes to a client who has red flags popping out of their ears — such as those who question your fees, have unrealistic deadlines, are difficult to reach, give vague answers to your questions, or simply give you a "bad feeling." Remember, you are interviewing the prospect as much as they are interviewing you.

If you receive a proposal request, ask questions to understand their expectations. Do they want a general overview, or do they require an elaborate breakdown of the work you plan to do? Are they looking for a specific approach or style? Having these answers will help you write a solid proposal without creating more work for yourself by providing more than necessary.

Can you help the client?

First and foremost, you need to consider whether the services you offer align with the needs of the client. It's important to be honest about this — or the walls will come tumbling down.

Benun advises showing your value by discussing the big picture, rather than specific content. By listening to a prospect's needs and asking thoughtful questions, you can demonstrate your understanding and experience in handling situations like theirs. Then, when crafting your proposal, Benun notes there is a subtle difference between saying how you will approach a client's needs and telling them exactly what you are going to do to meet those needs. For example, you may talk about how you plan to develop a content strategy for them without discussing the topics you'll recommend in your strategy. Those details come as part of the creative process and are what go into your final deliverables.

Listen more, talk less

Karen Kossow, email marketing strategist, shares her strategy. "I let the potential client do at least 75% of the talking — if not more. After learning about their pain points, I focus on why I plan to take a course of action even more than on how I'll do it. I offer an overview of my approach and approximate cost, as well as the estimated cost of not hiring me. I go into every call with the idea that I'm there to help, but not for free. Knowing my expertise has value and that I'm entitled to compensation for it is key to not giving away more than I'm comfortable with. Mindset is bigger when it comes to this topic!"

Liz Heflin, writer, editor, and business coach, acknowledges there's some risk in the discovery process — but it's all part of client acquisition. "It actually reminds me of building a personal brand. Yes, you give away a lot of free value, advice, and information, but in doing so, you position yourself as an authority. A good portion of this process is often educational. Not every business understands exactly what content marketing is, what it can accomplish, or how it works."

Time is money

If a prospect gets so into the weeds about the details of your approach that it would require you to begin work on their project, you need to draw a line. This can be a tricky area for writers.

In Marketing Mentor's podcast #453, communications strategist and writer **Doug Dolan** talks about the value of time. Your client won't know where the line is unless you tell them. Yes verbalize this by saying something like, "We're getting into the actual project deliverables now, and that's when the meter starts running. Let's take care of the paperwork now so we can come back to this conversation and get to work." You don't need to have a cadbrer mentality about everything you do for a client. Instead, be sure you are aware of how much time you spend that you are not billing for.

The span between creating a proposal and signing a contract can be lengthy. Dolan recommends tracking time spent in conversation, meetings, and research. This can be worked into your fee or viewed as a necessary expense… within reason. If it becomes a huge deficit, you may need to adjust your business model and consider building some of the cost into your contracts.

Overall, genereosity itself is a marketing tool. The "getting to know you" interactions are where trust and relationships are built. And with practice, you'll learn where your line is and when you are willing to step over it.

Drafting the proposal

Scope of work

The primary focus of a written proposal is the scope of work, which is an outline of what you plan to do for the project. It includes a breakdown of the tasks you will complete, the time frame for completion, and the cost of the project. This provides a clear understanding of what can be expected from you and what the project will entail, which is critical in avoiding "scope creep." Describe how these tasks will help achieve their goals and how they can measure results.

Be as detailed as possible about what you will provide *without writing the actual content*. Highlight the benefits of working with you, and explain the strategy behind your approach.

For example, you may talk about which webpages you wish to include or optimize without submitting the copy. For blog posts, you might include topics you will cover and the posting frequency, but not titles or summaries.

Additionally, you can include attachments that do not involve creating new or proprietary content:

Scope of Work Outline	Estimated Timeframe	Unit breakdown	Investment
Monthly scores for in-person or virtual consultations		24 hours X	$$$$$
Step 1: Brand audit / Ideal client / Competitor / Stakeholder profiles	$$$$$	Questionnaire review/Kickoff meeting X	$$$$$
• Define primary target audience(s), ideal prospects, • Define primary value/advantages, • Define competitors, and how they stand out in a crowded and saturated market, and what they do best. What makes them unique?			
Step 2: Mini website audit / content review	$$$$$	**Website audit report of 1 web or of 5**	$$$$$
• Evaluate for consistency, structure, appropriate links, Search Engine Optimization (SEO), user experience (UX), and relevant keywords • Does the website attract primary target audience(s)? • Content: What should, what can be improved or improved, and what may be added to achieve the bullet points above? Is it relevant, timely, and evergreen? • Personalized year-plan / four-current promotion offers for some packages to other financial advisors. We will explore ways to update your blog/articles/video and overall presentation to reflect your individuality,		Included: Social/Site map evaluation Page to page website audit Keyword/Competitor Content recommendations Action plan / Strategy	
Step 3: Social Media, CRM review / audit	$$$$$	**Social Media audit report of 1 platform or of 3**	$$$$$
• Review social media platforms and staff sending digital platforms (LinkedIn, Facebook & Twitter). We will provide an action plan on ways to enhance them. • Action plan to engage with your current clients/CRM list by promoting fresh email formats/subjects. • Review CRM: Ensure that it is being used to its maximum potential to track and nurture prospects and members who are clients. If relevant, we can consider recommendations/training (cloud solutions to host organizations/professionals and promote special offers), share information that may be of interest,		Included: 2 platforms analysis Action plan / Strategy	
Step 4: Blog/Newsletter/Video/Podcast Content Review	$$$$$	Web pages 2 Blog posts 3 Social posts 3 Add Customer 3	$$$$$
• Based on audit findings for your website and social media (Step 2), we will have a roadmap on the content we should create, as well as the existing content we can strengthen. • Review and recommendations for blogs/vlogs/podcasts. • You will be provided with a detailed breakdown of topics, what you can do with them. • Audio/Visual, photographic images, and graphic design elements to be created and/or edited to the website and/or blog/ newsletters/ per year.		Graphics / Visuals 3	
		TOTALS	$$$$$

* You may break the work down into smaller packages if you prefer, and choose your "steps."

Samples, case studies, and testimonials

A perfectly acceptable and effective way to showcase your abilities is to use samples or case studies of similar work you have performed for other clients. (In some cases, you may need to ask your previous clients for permission to share the work you did for them.) Include testimonials from those clients when you have them. By showing actual work you've completed for others, you can demonstrate your writing style and ability to deliver results without including any materials you would create for the project or campaign you're hoping to land.

Choose examples that are relevant to the client's needs. If they want help with their social media strategy, provide previous social media posts or case studies and the results of these social media campaigns. If they are interested in blogs or long-form content, choose a sample highlighting that type of work.

Protect your intellectual property

Some writers question whether they should include language about copyright or a non-disclosure agreement in their proposal. These safeguards are generally beyond the scope of a proposal, and usually reserved for completed works for government agencies or highly complex and confidential materials.

If you feel you need to create sample content specifically for your prospect, a straightforward way to protect yourself is to include a disclaimer in your proposal. This would state that the ideas and strategies outlined therein are your intellectual property during the discovery process, and cannot be used without permission. This puts responsibility on the client to maintain confidentiality of the information presented and should dissuade all but the unscrupulous, with whom you don't want to work anyway.

Benun stresses you can't be so paranoid about protecting ideas you may never use for another business that you scare a client away. Most will respect boundaries if you make them.

The big reveal

Benun recommends presenting your completed proposal in person or over video chat. By presenting live, you can address questions or concerns and make adjustments in real time, if you are willing. Being able to read reactions gives you a huge advantage over sending email and waiting indefinitely for a reply.

Benun also suggests using the term "investment" when discussing the price of your services. This makes a subtle yet positive difference over the words "cost" or "fee."

Prep Work: Proposal to Contract

Steps to know when (and how) to move forward with a proposal for the right prospects.

The dotted line

All of these actions can help lead you into a positive start with new clients. Proposals are living documents, and can be adjusted as you progress toward a final agreement. As with anything, you get better with experience.

Lessons learned

Have I changed my ways since my content was nicked? Absolutely not. I still lean toward generosity with my time and ideas. Without meaningful exchanges, I unless you know I'm a client and I are a good match. I invest more time in the honeymoon stage when necessary.

That being said, I understand better (as I hope you do) when to draw the line, and how to keep both prospective clients and myself happy. Oh, and the offending agency eventually went out of business. You really do reap what you sow.

So sow generously, but also set clear boundaries and you'll find yourself with more clients and fewer headaches!