

102 - Win More Clients with a High-Converting Proposal

Laura Davis: [00:00:00] In this episode, we're sharing what you should include in your high converting proposals to help you repeatedly win well paying clients.

Laura Moore: This is JFDI with The Two Lauras, the podcast where we chat about all things related to working in social media and share tips, advice, ideas, and inspiration to help you freelance social media managers with your marketing and your business.

Today on the show, we're talking about how to create a killer proposal, something that all freelance social media managers need in their toolbox. We're covering what your proposal should include to give a lead everything they need to easily say yes to working with you. And we're going to share a secret AI hack to make your proposal stand out above everyone else that that client might be speaking to.

So let's dive straight in. Laura, first up, I want to ask you a question. Have you always sent a formal proposal to win a client?

Laura Davis: Um, no, in simple [00:01:00] terms. But in the successful part of my freelance career, yes. But in the early days, no.

Laura Moore: I can sense a, uh, like a horror story coming.

Laura Davis: Well, it was not a horror story, but it was certainly a learning curve. And I think in my very early days, my first few clients were people I knew. So I kind of got those clients through conversation. It was one of my first cold leads that I got from LinkedIn, which I just find incredible because as you know, I'm not a big LinkedIn fan.

And it was cold lead and it, but it was a big lead. It was going to be like thousands of pounds a month. So I was really excited and we'd done the discovery call. And then I just popped an email over with like a few bullet points, kind of summarising what we'd talked about and saying, and I, when I mean a couple of bullet points, like literally a couple of bullet points, and then whatever my quote was, [00:02:00] and I didn't get it, and it was the first time I'd not won a client, and it was, I was, I just remember being gutted, and I remember being really embarrassed as well, because I remember having said to my husband, oh yeah, I've got this big lead, and kind of, I think I'd assumed I would just get it.

Which, you know, the arrogance of that anyway, but I don't know. Like, it wasn't like it was a job interview and I asked for feedback as to why I didn't get the job, but I'm fairly



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confident that that was why I, because it was such a high price I had given no kind of context to that price. I, I'd not really use a way to position myself.

So I sat down and I said, right, from now on, I'm going to use proposals. And it was then over that period of time that came after that, that I developed like a proposal template, which is the one which we now use in the toolkit. But it's one that since I started using that, [00:03:00] I've never not won a client. It has been, and actually lots of toolkit people have always won clients using it as well, so yeah, it was a steep learning curve.

Have you always used proposals?

Laura Moore: Do you know what? I think I have. I can't remember a time when I didn't, but maybe I, maybe it just doesn't stick in my mind. But I'm pretty sure I've always sent a proposal.

Laura Davis: Nice.

Laura Moore: I mean, it makes sense to do so, really, doesn't it, if you think about it? You just obviously weren't very clever back in the day.

Laura Davis: Well, no.

Laura Moore: Not as clever as me.

Laura Davis: No. Clearly not.

Laura Moore: So, shall we talk about then, like, what do we actually mean by, like, a formal proposal? Because clearly we don't mean a few bullet points in an email. So what, what actually do we mean?

Laura Davis: Yeah, well, I wonder whether it's just we should go one step back and just tick off what's happened in that discovery call.

So a discovery call is something that always precedes your proposal. And it's really important that a discovery [00:04:00] call is more them talking than you talking. So you should, on a discovery call, treat that as like a fact finding call. You should be using it as a way to get all the information you need to then be able to do that proposal.



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Because if you spend that whole discovery call talking about what you want to be saying and probably giving them way too much information and it ends up becoming like a strategy call, then you'll walk away with not having the information you need for your proposal.

Laura Moore: And actually we do get people ask us quite a lot in, in our Facebook groups, like, You know, I'm going to send a proposal to this client, how much should I put on it?

And we always, you know, what did they say in the discovery call? And quite a lot of people don't actually do that bit, that bit. And that's so important. Don't ever send a proposal unless you've done that discovery call. Because you won't be able to give the right answers and the right information in the right context.

And you're just kind of on a losing streak that way already, aren't you?

Laura Davis: Yeah, and you know, I think probably most people will have [00:05:00] figured out by now that no two businesses are the same. So it's, it's just essential that you, you know, get the facts that you need to be able to create your proposal, but your actual proposal is essentially just a document that is going to enable that business owner to be able to make an informed decision as to whether they want to work with you and why it should be you in a nutshell.

Laura Moore: Yeah, and I think it's important to remember, like, probably when you think about creating a proposal, you think that the most important thing to put on there is your price. And that is like really, really important. And that probably will be the first thing that somebody will look at when they open your proposal, but it's more than just your price.

It's like your pitch for the work. It's your opportunity to create a good impression. Yes. You've already had that conversation with them, but if you're creating a good impression on your proposal, they might need to show it to somebody else within that business who wasn't on that call. Who's never come across you.

Who's never [00:06:00] looked at your website, never followed you on any of the platforms. So the person who you might have spoken to on that discovery call takes that document into their meeting with any other stakeholders or whatever, or, you know, has



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to go and convince another business partner, that's what they're going to be showing them.

They're not going to be going, Oh, but go and look on their website or go and look at what they put on their stories. So that's the most important piece, isn't it? Because you don't really know who's going to look at it.

Laura Davis: It's like a CV or a job application, isn't it? It's the same. You know, no one's going to suddenly pop around to have a cup of tea with you to check out what you're actually like.

So you've got to make sure your proposal sells you. And you know, it's, it's, it's not just all about the price either, is it? If you say, It's not a case of, right, well, we, you know, I'm going to just start off by saying I'm, I'm the cheapest, I'm the best person, I'm the most affordable, because people don't hire that.

People don't want the cheapest, do they? They want, you know, what they can afford. They want the best for their [00:07:00] budget. So it is about trying to position yourself as the best for the price that you're, you're quoting.

Laura Moore: Yeah, I just want to pick up on something you just said then, because you said it's, it's like a CV if you were going for a job.

And I think we need to be really clear that a proposal isn't a CV, you don't need to list out all of your previous people that you've worked for and I did this before and you know, I worked in blah, blah, blah agency for this many years, but don't put that in your proposal. And I've seen people make that mistake.

When you do that, you just kind of detract from the important information. You start giving too much information and you start overwhelming people. So it's, it's very different from a CV. And people are not looking for that information in a proposal. So don't confuse yourself and try and put all of that stuff in it either.

Should we actually on that note, should we talk about other things that probably shouldn't go into a proposal?



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Laura Davis: Okay. Well, and this is something I see all the time because we get a question where people will say, how [00:08:00] long does it take you to do a proposal? It's taking me 20 hours and I'm still not finished yet.

And the alarm bells go off in our heads and we're like, uh, what are you actually putting in your proposal? And it turns out a lot of people seem to make their proposal like a strategy, which.

Laura Moore: Oh. That's not good.

Laura Davis: They shouldn't, no, no, no, no. They should not be doing your, there is no, you don't want to be telling them how to do anything in your proposal.

And that seems to happen quite a lot where people feel like if they give them, you know, this is how your Instagram grid will look like. And this is, you know, a competitor analysis, all of that stuff, they feel like it will position them better, but it won't, all you're doing is giving them work for free.

All of that happens once you've got money in the bank and contract signed. So you don't need to include anything on how to do that. Anything apart from how to hire them.

Laura Moore: Yeah. And also like, you [00:09:00] don't need to go and like audit their accounts and give them three things you should probably change straight away and all of that stuff.

You don't need to do any of that at all. You should have all the information you need from that discovery call. And yeah, there might be some things that you want to go and look at just to make sure that you are happy to take on this client and that you've got, you know, everything that you need to know.

But 99 percent of the things that you need to know to put in that proposal should have come from that discovery call and probably take, what, 20 minutes, half an hour max to write a proposal? Yeah. How long would you take to do yours?

Laura Davis: I don't know. I'd probably, I'm not as quick as you, but I'd say probably 15 minutes, 30 minutes max because I get distracted.



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Laura Moore: Yes, we know that.

Laura Davis: But I definitely think, you know, you have to put, you have to, it's fine to kind of set that scene, you know, as Laura says, you don't need to go into loads of detail, like you're using really crap hashtags and you're, you know, but if they've said on that discovery call, we really struggle with getting reach, we don't have anyone watching our [00:10:00] stories, you can reiterate that, you can pop that back in to say, this is what I know your struggles are, because that shows that you've listened.

But you don't have to then go and do further investigative work and further auditing. Um, it's just use what they've told you and to kind of flip it to say, look, I've listened. I know these are your problems. And then the proposal is that you are the best person to fix those problems.

Laura Moore: Yeah. Yeah. And we're going to give you a really sneaky AI hack to do this later in the podcast.

But yeah, like you just said, it's like identifying those problems they've had, reiterating the problem back to them, but then, and on your stories example, you know, you've told me you're not getting great story views. Well, this is part of our strategy will be to look into why that's not happening. And then we'll focus on increasing that rather than how we're going to increase that.

And that's what kind of sets you apart maybe from anybody else. So yeah, I think that that's, [00:11:00] that's definitely right. Anything else that we wouldn't put in a proposal? I know I said earlier about not overwhelming and putting too much information in. Do you think there's anything else that we want to make sure we don't put in?

Laura Davis: Well, I, uh, uh, I know something. We definitely don't want to give them pricing options.

Laura Moore: Yes. A hundred percent. Avoid. We don't want any of this gold, silver, bronze stuff.

Laura Davis: Yeah. Or platinum.



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Laura Moore: No. It's one proposal, one option, one price. But you could have, if you want added extras, because maybe they might've said to you, well, we're thinking about doing blah, blah, blah.

You could have those as addeds that people can be like, no, actually I don't want that. But don't say, oh, it will be this price to have. These 10 things and this prize to have these 12 things, like it's just, and a third price to have 15 things. No, no, no. We're not doing that. And we're not pricing per post.

We're not pricing per reel. We're not doing any of that. No, no, no, no. But I don't think this is a pricing podcast.

Laura Davis: No, let's not get too far down that path. But just to kind of [00:12:00] reiterate what you said before, we are not striving to overwhelm people here. We're trying to make this a really simple decision for them.

So if you give them too many options, people will just find decisions like that really difficult. So if someone's got a proposal that just says, look, I'm going to answer your problems and it's this cost, or you put a proposal going, I'm going to answer your questions when you can do it this way, you can do it that way, you can do it this way, and they don't know which is right, because they're not the marketer.

They're going to go with the person who has just made it simple. You know, so just try to keep that in the back of your mind, you're not there to overcomplicate, you're not there to overwhelm.

Laura Moore: And you're not there to give them like a pick and mix, because if they've told you what their problems are, you know what the solutions are.

You're not going to pick and mix the things that they might want to solve those problems because they don't know what the solution is, you do. So you need to take control and say, right, to fix these problems, you need these things, this is how much it's going to cost. Yeah. [00:13:00] Job's done.

Laura Davis: Nice.



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Laura Moore: So in terms of what actually goes into like a successful proposal, obviously the price is important and like I said earlier, whoever opens your proposal, if they're anything like Laura and I, they will go straight to the price and then they will read the rest of the proposal.

But it's really important to know that because they won't go straight to the price and then that's it. Job's done. Decision's made. They'll look at the price, but then they want to know the context for what actually am I getting for my money? Like why has, why is it that price? And it's not like you need to justify your price, but you do need to give context around it so people understand it.

And that's what your proposal is for. So some of the things that you would put in your proposal to kind of give that kind of context would be like Laura's already said about, you know, showing that you understand their objectives, their problems, repeating their own words back to them, all of that sort of stuff.

But you're also going to want to kind of break down what it is you're going to be delivering. Not in terms of, I'm going to do five [00:14:00] posts on Instagram every week and two reels, not that kind of thing, but you're going to list out what you're doing in terms of like, social media management, which will include video editing, which will include SEO research, you know, all of those sorts of things.

And it's not, we could include it's we, we are including, this is what you're getting. It's not a, like I said earlier, it's not a pick and mix. They, this is what they're having.

Laura Davis: I think that's a really important part, because if you were to just say, my price is £1000 and what you're getting is social media management.

And that's it. That's not helping them. with that context, is it? They want to know, but lots of people don't realise what social media management is, you know, and no, even some of my longer clients, I still sometimes have to remind them everything that we do. And it's sometimes, you know, they forget that you're customer service, your first point of contact for complaints, potentially you're, you know, responding to questions, you're, you know, as you say, you're [00:15:00] editing videos, you're doing loads of research, you're doing kind of competitor analysis is, you know, there's so much to it.



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And I think sometimes we forget that because we just take it for granted, which I used to do it. So just make sure that you're really clear on kind of setting that scene, painting that picture. So then when they see the price, they go, oh my God, yeah. I forgot that they would be doing all of this. And then when you list out

Laura Moore: That's a bargain.

Laura Davis: Yeah, and then they'll be thinking, Oh my God, the weight that that's going to lift off my shoulders, because someone's going to be dealing with all of this. It's just such a beneficial position for you to be in when you give them that kind of context.

Laura Moore: Definitely. What else would we put in it?

Laura Davis: I definitely think you need to, like, position yourself, like, use it as an opportunity to kind of say, I am the best for this job.

So, including things like testimonials, like quotes from other people to give you the context, again, [00:16:00] that you're the best person for the job. And don't just necessarily, if you've got some great testimonials from previous clients, don't just use one. And assume you'll just use that one all the time. If you've got one in a similar industry, or maybe they had similar problems and you.

The testimonial talks about how you resolve that problem, use that. Like, don't just dish out the same ones all the time. Make sure that how you're positioning yourself is very relevant to the business and the problems that they're having, not just randomly. Oh, well, this will cover any business that inquires with me.

So definitely think about how you can position yourself.

Laura Moore: Yeah, definitely. I think another thing that's important to put in there is like a timeline of what actually happens after they've said yes to working with you. Because people always want to know what the next steps are. Like, so they're like, okay, so what happens if I actually do say yes to this person?

Am I going to have to wait? Like, how quickly can they take me on? Am I going to have to wait for weeks? How long is it [00:17:00] before they're actually going to start posting on



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my platforms? And if you lay all of that out from the get go, it sets kind of their expectations. So they know they're not left disappointed.

They're not left confused. And also you can use that as another opportunity for, kind of giving context around the price because you can put, you know, like weeks one to four are research or strategy or whatever and you can kind of build that out so they really understand what it is that they're paying for.

Laura Davis: Yeah, no, definitely. A hundred percent. So I think, I think you could, uh, should explain this next little hack because you were the one who discovered it. But now in the day of AI, there's ways in which you can really nail this with your proposal off the back of a discovery call. But do you want to explain how it all works, Laura?

Laura Moore: Yeah, and I think this is something that's going to make your proposals better, but it's also going to make them quicker for you to do. So we were talking about discovery calls earlier and how you must, must, must do a [00:18:00] discovery call. I would love it if you would get into a habit of starting to record your discovery calls.

Okay, obviously ask for permission, but make sure you're recording your discovery calls. We use a tool called Fathom, and we'll put the link for that in the show notes. And that is this special AI tool that during your Zoom calls or whatever it is that you're doing, whether it's a discovery call or any other call with a client, it will record it or transcribe it and you can make notes and stuff on it.

But the way that you can use it for your proposals is to record your call, use Fathom or ChatGPT to then use the actual, um, transcript to pull out information. So if you're using Fathom for this, you would need a paid plan, but you can also do this in ChatGPT. So you can download the transcript from your discovery call.

Upload it into ChatGPT or just do this in Fathom, and you're going to ask three very specific questions. Now if you've kind of zoned out, I want you to come back to me and just really pay attention to this because this is really important. There's three questions that you can ask [00:19:00] AI to help you to write these proposals better.

So you're going to ask it. Question number one, based on the transcript, please summarise, obviously you have to say please because you have to be nice to the robots, summarise the



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biggest pain points using their own words, okay, that will help you to understand what, you know, did you understand their pain points properly, but also exactly how did they put them, because then you can use those words.

Second question, based on the transcript, summarise their main objectives using their own words. And again, you're going to use their own words in your proposal to make sure you've covered all the objectives and everything they want to achieve. And then the third and final question you're going to say, based on the transcript, highlight any objections you foresee we might need to overcome because they might have highlighted something in that conversation with you that you haven't picked up on.

Like, oh, you know, I need to make sure that the team are okay with this or we're not very good at getting videos or whatever it is. And the AI can then help you to [00:20:00] highlight those things so you can overcome them before they actually happen.

Laura Davis: Love this.

Laura Moore: And then you're going to use all of that information that you've gathered, use their exact words in your proposals, but also in your follow up conversations.

So you're repeating their own words back to them because that's, there's power in that. That will help them to really feel like you understand them. You understand their challenges. You understand exactly what it is that they want to achieve. And probably no one else is actually doing that because no one else has bothered to take the time to really understand what it is that they want.

And if you already understand their objectives beforehand, you can overcome them before they ever actually bring them to you. So make sure you definitely do that. The tool again that we use is called Fathom, but you can also do that in ChatGPT just with the transcript. What else can we do to make proposals easy, Laura Davis?

Laura Davis: Oh, it's not quite as fancy and robotic, or maybe it is, but it's using templates. So right at the start of this podcast where I was talking to you about when I didn't use a template or [00:21:00] proposal, I created one over a few attempts, like it was a bit trial and error and then I nailed it. And then I use that same proposal template for every single client that I ever went for after that.



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And as I said, I never, never, ever didn't win a client as a result, which is great. So, and the reason I did that is, and don't get me wrong. I tweaked it. I changed it. Like we've mentioned, I changed the testimonials. I obviously changed the context to make it relevant for each individual client, but it made the process just so much quicker.

I was able to then just bash out these proposals, as we said, you know, 15 minutes, half an hour, and they were done. I wasn't wasting hours on them, because it kept me focused. It gave me that structure that I needed to be able to complete that proposal, rather than starting from scratch all the time. So, that way you can kind of be ensured, yes, it will make things quicker for you, but you're going to be consistent.

You know it's [00:22:00] working, so, don't, don't, what's the phrase? Don't break. What? No, don't what's -

Laura Moore: Don't fix what's not broken.

Laura Davis: Don't break. That will do.

Laura Moore: Don't fix what's not broken.

Laura Davis: Is that actually it?

Laura Moore: That actually is it.

Laura Davis: That didn't sound right. Anyway. That. Um, you know, and just keep using that same template. If you're lucky enough to have The Social Media Managers' Toolkit, then you can get your hands on the proposal template that we're talking about in terms of the one that I used to use.

It's very much loved by the toolkit owners. Lots and lots of people message us all the time about how they've won clients using that proposal. So do, if you've got the toolkit, do remember it, go have a look at it. And there's lots of different designs that you can use and obviously still tweak and edit them to make them work for your brand.

If you haven't got the toolkit, then head to thetwolauras.com/toolkit and go and check out all the other things that you get as well [00:23:00] as this incredible proposal template.

Laura Moore: We'll pop the link for that in the show notes as well.



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Laura Davis: Yep.

Laura Moore: So I hope that this episode has been useful. And if you are in the process of trying to win a client, remember all of these things that we've told you to create a really strong high converting proposal.

Remember the little AI hack. We'll put the link for that Fathom tool in the show notes as well. And we'll be back same time, same place next week.

Laura Davis: We will indeed. Au revoir.

Laura Moore: Toodlepip!

