Marketing Consulting Proposal Template

Thank you for downloading this sample proposal template from CoSchedule. You can customize it to land more clients in your marketing consulting business.

Instructions and example text are included in this template.

Instructions are included in a grey box, like this one:

Here are some instructions about how to use this section of the template

Example text can be found in each section in regular writing.

Make sure to fill in your company name and your client’s name where appropriate.

Also, be sure to delete this page before sending off your template.

Happy Consulting!

P.S. Because we recommend sending a contract separate from the proposal, we did not include a “Terms and Conditions” section at the end. Add that section in as you see fit.



|  |
| --- |
| Marketing Consulting  PROPOSAL  subtitle text here |
| Company Name Street Address  City, ST ZIP Code  Phone  Email |

## Company Name Marketing Plan

During our previous correspondence, we established that in order for {company name} to feel this arrangement was successful, you’d need to [state client goal].

Therefore, the mission is to [restate client goal in very specific, tangible terms.

ex. Double your sales volume in the next 18 months.]

### **MARKETING CHALLENGES**

The main obstacle {company name} currently faces is [state main pain point ex. Generating more interested, qualified leads].

In order to achieve [client goal], the following strategies were discussed:

* Establish a recognizable brand that clearly communicates the values, mission, and vision of the company, thereby associating {company name} with {company’s values} in the mind of prospects.
* [State a problem you will solve, start with an action word]
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### **PROPOSED SOLUTION**

[Provide overview of plan] Example:

### To reach your goals, we will take a comprehensive, four-pronged approach:

### Leverage existing marketing efforts

### Create new avenues for lead generation

### Build trust and authority

### Develop timely offers

### Together, we will implement a marketing strategy focused on recapturing internet traffic and converting traffic into new customers.

### This will start with an information gathering phase including a traffic analysis campaign, customer demographic analysis, and keyword research.

### Next, we will create a comprehensive plan. A content strategy will be developed to build trust with potential customers and reach qualified prospects with strategic messaging.

### Implementing the plan will include [brief general overview of services. I.e. social media campaign, SEO optimization of website, etc.]

#### Delivering Results

[Now is your chance to elaborate on the specific services you will provide. Focus on the highest value results for your client, and directly relate each one to the problems outlined in the challenges section. For each bullet, describe why the result is desirable and what will you do to create that result, specifically.]

To meet {client name}’s needs we recommend the following services:

* Create Visual Brand Identity – Leave an unforgettable impression on your prospects and customers. {my company}’s creative team will collaborate with you to create a unique logo and cohesive visual identity to instantly set you apart from the competition.
* [State result.] - [Describe why result is desirable.] [List specific action you will take to achieve desired result.]
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#### Why Choose Us?

[Here is your chance to brag about your company. State some previous results and what makes you special. Tell the prospect about your company. What can you do for the client that no one else can? Emphasize previous results.]

[Use graphics, photos of yourself or other relevant images. Limit this section to 1 page, or about 3-4 paragraphs.]

Focus on what you do best. Allow {my company} to take care of your marketing needs….

#### Timeline & Investment

Based on our initial assessment and previous correspondence, we propose the following timeline. Of course, this is subject to change as we gather more information and adapt our strategies. Here is a rough timeline of what to expect:

**Phase 1: Comprehensive Analysis**

Analyze competitors marketing strategies to compare...

Estimated Completion Date: 08/25/XX

**Phase 2: Brand Building**

Create visual elements and materials that will...

Estimated Completion Date: 08/25/XX

**Phase 3:**

[Insert Summary]

Estimated Completion Date: 08/25/XX

**Phase 4:**

[Insert Summary]

Estimated Completion Date: 08/25/XX

**Total Fee: [XX/month] or [$XX,000]**

#### Next Steps

We would love to get started working together to help you [insert client goal].

To get started, please:

[Specify what the prospect must do to accept the offer] Example:

1. Accept the proposal and/or discuss desired changes
2. We will send you a contract to sign
3. Submit an initial deposit of…

[State what will happen immediately after the offer is accepted to set expectations.]

We look forward to working together with you.

Thank you,

Your Name

Your Position