Freelance Proposal Help

How We Use This Simple 4 Step Selling Framework to Weed Out Bad Clients, Uncover Client's Needs & Win 80% of Our Proposals

Worksheet

Remember

"If you don't have a consistent sales system, then you won't have consistent sales. "

I'm here to help you implement the selling system that's worked for us, so you can put it to work in your business right now to gain bigger proposals with better clients in less time.

Let's dig into it.

Step #1 You Must Qualify the Client to Protect Your Time

The first step of the process is we need to qualify the client. Let me give you an example of how this works. If a client would come into our office, call us, or fill out a contact form on our website, we first want to jump on the phone with them for 10 to 15 minutes so we can get to know the client, build rapport with them, understand the scope of work, what their budget is, what their goals are, timelines and to figure out if we can help them and if we want to work with them.

Write down all of the qualifying points the client must meet for you to want to move them them to Step #2.

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If clients qualifies, move them to step 2, if not, you can decline the project or refer them.

Step #2: Project Needs Assessment Form (PNAF)

The second step in the process is we have the client fill out a project needs assessment form commonly known as a new client intake form. Our main objective of the form is to do a dive deep and get their project why.

This form it enables us to ask even more questions on what they want to achieve in the project, what's their budget, what are their income goals, what kind of money are they making now, what major problems are they looking to solve with the project, what does success look like, what scares them about the project?, etc.

Write down all the project needs questions you want the client to answer for you so you can understand deeper the client's needs in written detail.

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If clients qualifies, move them to step 3, if not, you can decline the project or refer them.

Step #3: Project Discovery: Dive Deep to Discover the Client's "Project Why" & Their True Project Needs & Goals

After we get their form, we book a call with the client to go over the form in much more detail. Go deep with the client to really figure out exactly what it is they need. What are their problems? Figure out together with them what solutions are going to help them solve their problems and reach their goals.

Write down all the "Project Why" questions you and the client need to discuss in detail together to understand what problems and solutions are needed to reach the project goals. Build the scope of work with the client by asking Why….

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If clients qualifies, move them to step 4, if not, you can decline the project or refer them.

Step #4: Write the Proposal: Have Clients Close Themselves by Asking You to Write-Up a Proposal to Get the Project Started.

You want the client to say Yes for you to write up the proposal to get started.   When they do this, they're in many ways saying YES to the project.

Ask the client this…

"Do you feel that we have developed together a good scope of work that will solve your problems effectively for this project... if so….do you want us to create a proposal / contract so we can officially get started on the project for you?"

When the client says YES…

Then write up the proposal and present it to them to show how the project is managed and delivered and have them sign it!

Congrats...you've won the project!

TAKE ACTION!

Implement this in your business today & close bigger projects

BONUS

Want to get even more proven client winning strategies, frameworks, blueprints, trainings & content so you can win bigger proposals with better clients…. then
subscribe to our VIP members email list

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