

# Sales for Marketers

By John Doherty  
Founder, [GetCredo.com](https://getcredo.com)

# Outline

<b>Sales for Marketers</b>	<b>1</b>
Outline	2
Foreword	4
Chapter 1: Generating leads	6
How to get more leads	7
How to get more marketing qualified leads	7
1) Increase your keyword spread and traffic	7
2) Create content upgrades on your top content	9
3) Implement email captures for long dwell times on a page	11
4) Implement lead scoring based on user behavior	12
5) Break forms into multiple pages and elongate your funnel	15
6) Clarify your offer with video	16
7) Drive targeted paid traffic	18
What's next	18
Chapter 2: What to do when a client contacts you	19
How to respond to a potential new client	20
Chapter 3: What to learn on the first call	23
Chapter 3: After the first call	26
Follow up with a recap	26
Thank them for their time	27
Recap the details	27
Chapter 4: Deciding whether to pitch the work	29
How to decline a pitch	31
Chapter 5: The scope email	33
What to include in the scope email	34
Chapter 6: The proposal	36
Intro to writing a proposal	36
Structuring the proposal	37
Summary	37
Project scope/focus	38
Project structure	39
Needed access/requirements	39
Pricing	40
A word about pricing	42
Software to use	42

How to send a proposal	43
Chapter 7: Contracts	45
Why you should always work under a contract	45
Should you let the client use their contract?	45
Payment terms	46
Gotchas	46
Long leads on payment	47
Minimum notice	47
Financial obligations	48
Provisions in case of acquisition	48
Liability Insurance	48
Conclusion	49
Good luck	50

## Foreword

This book has been written out of my experience over the last three years working with both businesses looking to hire as well as marketing providers. In that time, I have seen 1,600+ businesses with a collective \$16,000,000+ in marketing spend come through my platform.

15-20% of that has closed into contracts for consulting work, which means I've helped businesses on Credo earn more than \$3,000,000 collectively.

In the same amount of time I have worked with over 150 agencies to help them get more clients. Many of them I have sent client leads, but I have also advised many on their sales processes. I have learned what works and what does not.

I have seen agencies close over six figures in annualized revenue in less than 30 days, and I have seen others struggle to close anything.

As a specialized SEO consultant myself, I have closed over \$500,000 in consulting work in the last three years. When I decide to pitch a project, I know with 90% confidence that they will sign into a client that pays what I ask. If they end up hiring a consultant at all, I have never lost a pitch.

How can this be? How is it that some agencies or consultants close an incredible amount of work but some struggle to close anything?

It all comes down to your process. If you have a good sales process to take a new contact, whether a form submission or a phone call, and turn them into a qualified lead to whom you then send a great proposal and receive a signed contract, then you can do very well.

If you don't have a process for vetting if a project/client is the right fit for you to go along with a sales script that builds trust from the start, then you will struggle to close work. Even if you have these, if your process for then sending the proposal and turning that into a closed contract is broken then you will still struggle.

This book walks you through the sales process that I have personally used and trained many agencies and consultants to use to close more work, and often for bigger budgets than they were selling before.

If you take my advice and actually apply this process to your business, you will see a measurable change in your close rates and your revenue.

Enjoy!

John Doherty  
Denver Colorado  
July 2018

# Chapter 1: Generating leads

Before you start selling work, you need to generate leads. While a lead generation guide is outside the scope of this book, it is important to discuss what I mean by a lead and a few ways to generate them.

There are three levels of leads:

1. Lead
2. Marketing qualified lead
3. Sales qualified lead

Leads are turned into MQLs, which are then reached out to by a sales team that sees if they are qualified to be solid to.

A “lead” is something like an email address and first name of someone who signed up to a free piece of email content.

A “marketing qualified lead”, or MQL, is someone who has signed up to a piece of content and done something to show that they are interested in your services. I do this using [Drip](#), though you can use whichever marketing automation tool you know best.

## Special Pages

We add or remove points from the lead score each time a subscriber visits certain pages on your website. Enter a path and point value for each special page, or leave them blank to exclude them from the lead score calculation.

Benefits or Tour Page /how-credo-works/	7 points
Example: /tour	
Pricing Page /free-consultation/	8 points
Example: /pricing	
Careers Page /pros/	-5 points
Example: /careers	

## Lead Threshold

Configure the point value at which we consider a subscriber to be an actual lead. Before this point, subscribers are just “prospects”.

## Initial Score

Configure the point value assigned when a subscriber is first flagged as a prospect. This allows room for the subscriber's score to decay due to inactivity.

A “sales qualified lead”, or SQL, is a lead that has then been contacted by the sales team, is qualified to be a client, and is within the sales cycle. Once an SQL signs, they then become a client.

## How to get more leads

Marketers are always looking for “more leads”. I believe, from my experience running Credo, that most marketers need a combination of both more and better leads.

If you're not getting any leads, then that is the first problem you need to solve. The strategies you use to attract contacts that you can then turn into clients stay the same regardless of who you are targeting and trying to convert.

If you already have leads coming in but they are not the right fit for you to work with (assuming you've specialized in something, and if you haven't then you should read [Built To Sell](#)) then you need to rework your conversion and messaging to attract the right people and repel the wrong.

## How to get more marketing qualified leads

Getting more marketing qualified leads is the goal, so how do you get there?

These are the strategies I and many others have used to drive very real results for our businesses and clients. Do remember that the most effective strategy for driving more leads involves the full marketing funnel. Simply implementing one or two of these without a view towards measuring and optimizing your conversion flow will mean that you do not see the results that you could.

Here are some strategies to implement to get more MQLs.

### 1) Increase your keyword spread and traffic

If you're struggling to get enough leads, then the first place to look is at your traffic. How well are you ranking for the terms you are optimized towards for SEO, and how effective are your paid marketing campaigns in bringing qualified users to your site?

Using a tool like SEMrush ([click here for a free 7 day trial](#)), you can enter your domain and see the keywords your website ranks for as well as their position and monthly search volume.

	Keyword	Pos. ▾	Volume ▾	KD ▾	CPC (USD) ▾	URL	Traffic % ▾	Costs % ▾	Com. ▾	Results ▾	Trend	SERP	Last Update ▾
<input type="checkbox"/>	credo	12 (13)	49,500	66.92	2.07	<a href="http://www.getcredo.com/">www.getcredo.com/</a>	27.57	8.99	0.16	77,400,000			1 hr ago
<input type="checkbox"/>	maquest.ca	9 (8)	4,400	79.56	0.71	<a href="http://www.getcredo.com_views/">www.getcredo.com_views/</a>	1.11	0.12	0.13	1,340,000			1 day ago
<input type="checkbox"/>	seo consultant	17 (19)	4,400	63.48	19.02	<a href="http://www.getcredo.com_tants/">www.getcredo.com_tants/</a>	0.72	2.25	0.39	3,780,000			1 day ago
<input type="checkbox"/>	side hustle nation	12 (16)	1,900	62.14	1.45	<a href="http://www.getcredo.com_dcast/">www.getcredo.com_dcast/</a>	0.17	0.04	0.05	-			12 Jun 2018
<input type="checkbox"/>	john doherly	6 (7)	1,900	74.50	0.42	<a href="http://www.getcredo.com_harty/">www.getcredo.com_harty/</a>	4.07	0.26	0.04	34,800,000			30 May 2018
<input type="checkbox"/>	john doherly	5 (6)	1,900	74.50	0.42	<a href="http://www.getcredo.com/">www.getcredo.com/</a>	4.07	0.26	0.04	34,800,000			30 May 2018
<input type="checkbox"/>	canonical tag	18 (18)	1,600	59.89	0.00	<a href="http://www.getcredo.com_ttag/">www.getcredo.com_ttag/</a>	0.17	0.00	0.00	9,670,000			30 May 2018
<input type="checkbox"/>	business verticals	14 (21)	1,300	76.00	0.00	<a href="http://www.getcredo.com_temag/">www.getcredo.com_temag/</a>	0.38	0.00	0.01	9,440,000			30 May 2018
<input type="checkbox"/>	backlinko	17 (10)	1,300	65.15	12.41	<a href="http://www.getcredo.com/backlinko/">www.getcredo.com/backlinko/</a>	0.04	0.08	0.01	628,000			12 Jun 2018
<input type="checkbox"/>	seo pricing	16 (71)	1,000	61.40	14.23	<a href="http://www.getcredo.com_rates/">www.getcredo.com_rates/</a>	0.21	0.47	0.37	12,000,000			30 May 2018
<input type="checkbox"/>	seo freelancer	16 (35)	1,000	61.80	12.41	<a href="http://www.getcredo.com_itant/">www.getcredo.com_itant/</a>	0.21	0.41	0.38	15,000,000			30 May 2018
<input type="checkbox"/>	increase website traffic	11 (12)	880	70.65	8.34	<a href="http://www.getcredo.com_2017/">www.getcredo.com_2017/</a>	1.75	2.32	0.64	133,000,000			30 May 2018
<input type="checkbox"/>	online marketing consultant	6 (8)	880	59.56	13.19	<a href="http://www.getcredo.com_itant/">www.getcredo.com_itant/</a>	1.88	3.91	0.25	258,000,000			30 May 2018
<input type="checkbox"/>	how to get traffic to your website	7 (6)	880	73.74	6.42	<a href="http://www.getcredo.com_2017/">www.getcredo.com_2017/</a>	1.50	1.51	0.69	840,000,000			30 May 2018
<input type="checkbox"/>	how to drive traffic to your website	7 (5)	720	68.90	8.38	<a href="http://www.getcredo.com_2017/">www.getcredo.com_2017/</a>	1.20	1.62	0.69	206,000,000			30 May 2018
<input type="checkbox"/>	content marketing companies	20 (17)	590	61.58	20.89	<a href="http://www.getcredo.com_etinq/">www.getcredo.com_etinq/</a>	0.04	0.24	0.35	572,000,000			30 May 2018
<input type="checkbox"/>	consultant hourly rate	10 (12)	590	73.20	3.84	<a href="http://www.getcredo.com_linq/">www.getcredo.com_linq/</a>	0.72	0.45	0.08	17,300,000			30 May 2018
<input type="checkbox"/>	what is anchor text	17 (23)	590	62.72	0.00	<a href="http://www.getcredo.com_2018/">www.getcredo.com_2018/</a>	0.08	0.00	0.00	284,000,000			30 May 2018

Then use their Keyword Gap tool to compare your site against your competitor's to uncover more keywords that you should be targeting with specific pages and/or content:

Keyword Gap
Desktop
Mobile
TUTORIAL

Enter up to 5 domains to compare, select keywords and intersection types, and press the Go button.

moz.com
getcredo.com
Enter Domain
Enter Domain
Enter Domain
GO

Organic Keywords
Organic Keywords
Organic Keywords
Organic Keywords
Organic Keywords

moz.com
moz.com
getcredo.com

219,411
1,548

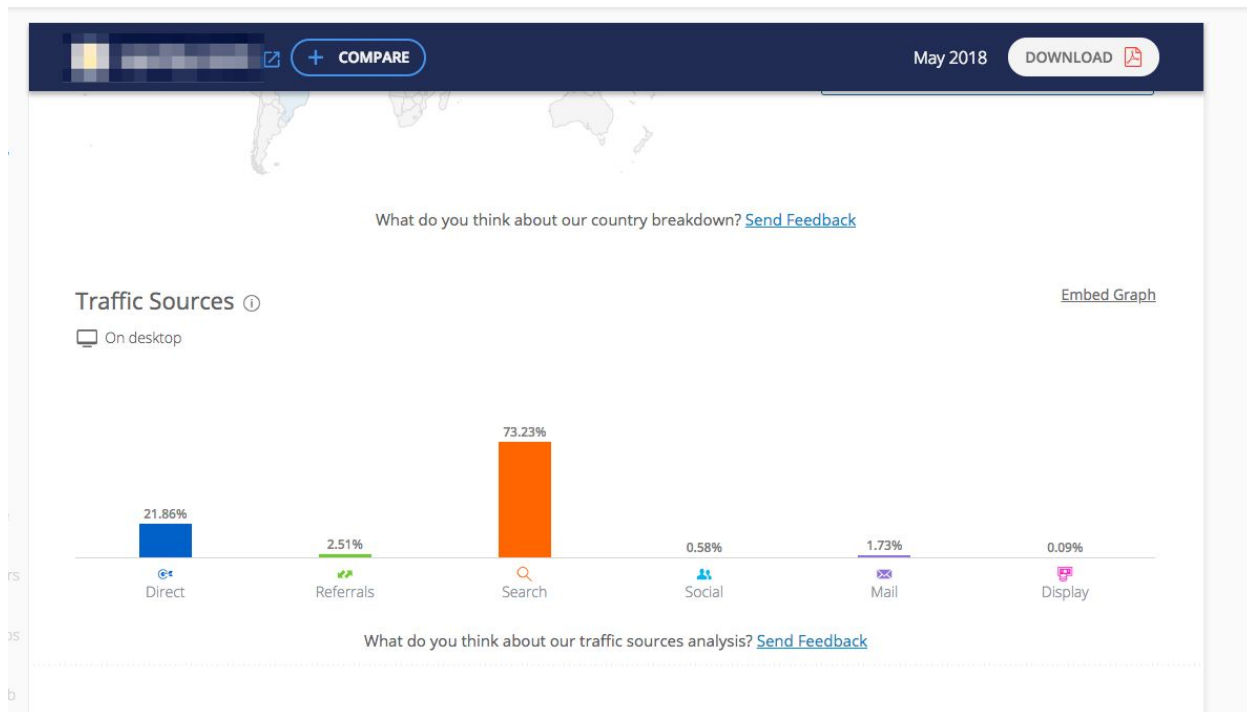
Live update
moz.com (by organic)
getcredo.com (by organic)
1 - 100 (1,548)
Show: Table View
Enable Charts

Add to Export Manager
Advanced filters
Export

	Keyword	Moz.com ▾	Getcredo.com ▾	Volume ▾	KD ▾	CPC (USD) ▾	Competitive ▾	Results ▾	Trend
<input type="checkbox"/>	how to get hits on your blog	1	69	10	68.41	0.00	0.00	412,000,000	
<input type="checkbox"/>	pagination seo	1	48	10	60.79	0.00	0.03	745,000	
<input type="checkbox"/>	canonical code	1	30	10	65.32	0.00	0.00	28,400,000	
<input type="checkbox"/>	moz website analysis	1	95	10	81.80	3.02	0.43	2,120,000	
<input type="checkbox"/>	seo search engine optimization getting started	1	70	30	76.45	0.00	0.00	55,500,000	
<input type="checkbox"/>	moz crawl report	1	38	30	81.80	0.00	0.00	72,000	
<input type="checkbox"/>	seomox case	1	57	10	80.86	0.00	0.18	14,000	
<input type="checkbox"/>	what does moz stand for	1	36	70	79.12	0.00	0.02	4,370,000	
<input type="checkbox"/>	how much do seo make	1	15	10	76.49	0.00	0.02	201,000,000	

From here you can use a tool like [SimilarWeb](#) to understand where your competitors are getting their potentially converting traffic as well:





Now you get to put together a plan to execute and build that content and those links and those relationships that will drive you more traffic.

For the vast majority of businesses not getting enough leads, you need a bigger audience.

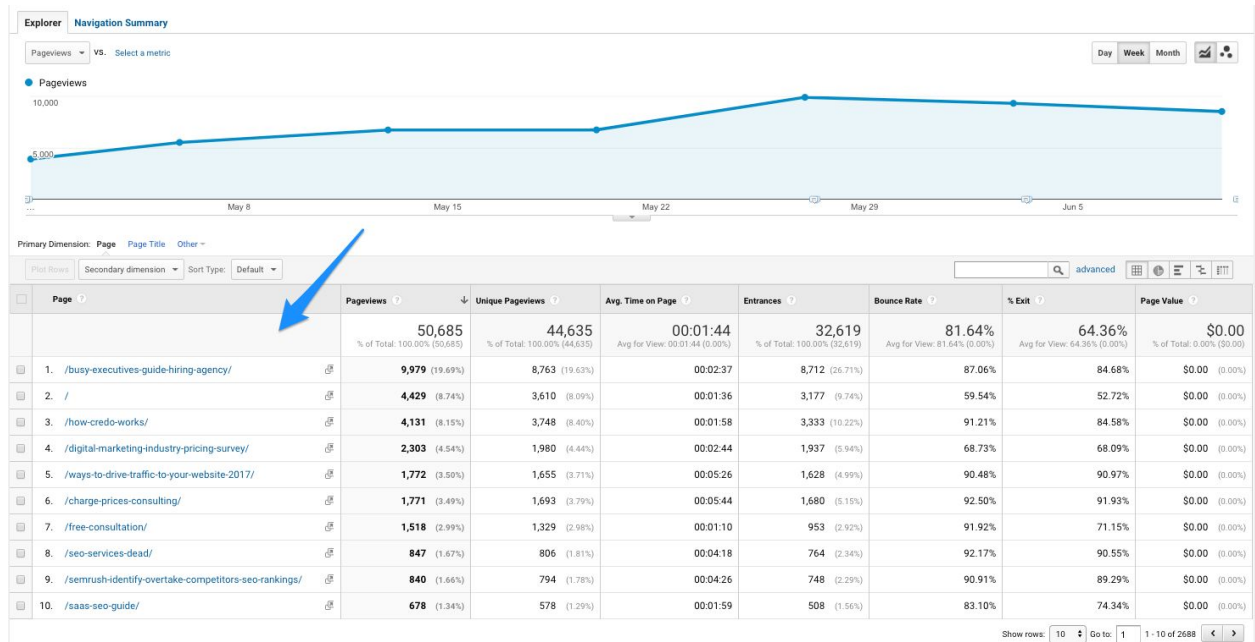
## 2) Create content upgrades on your top content

The next way to convert your newly acquired audience to initial leads (not yet MQLs though!) is by offering them something of value that lets them take their newly acquired knowledge further.

I'm not talking about a "sign up to our RSS feed" or "get our weekly newsletter" calls to action. No one wants to sign up to those.

Instead, give them something of immense value that answers their question of "Ok, how do I go deeper on this now?"

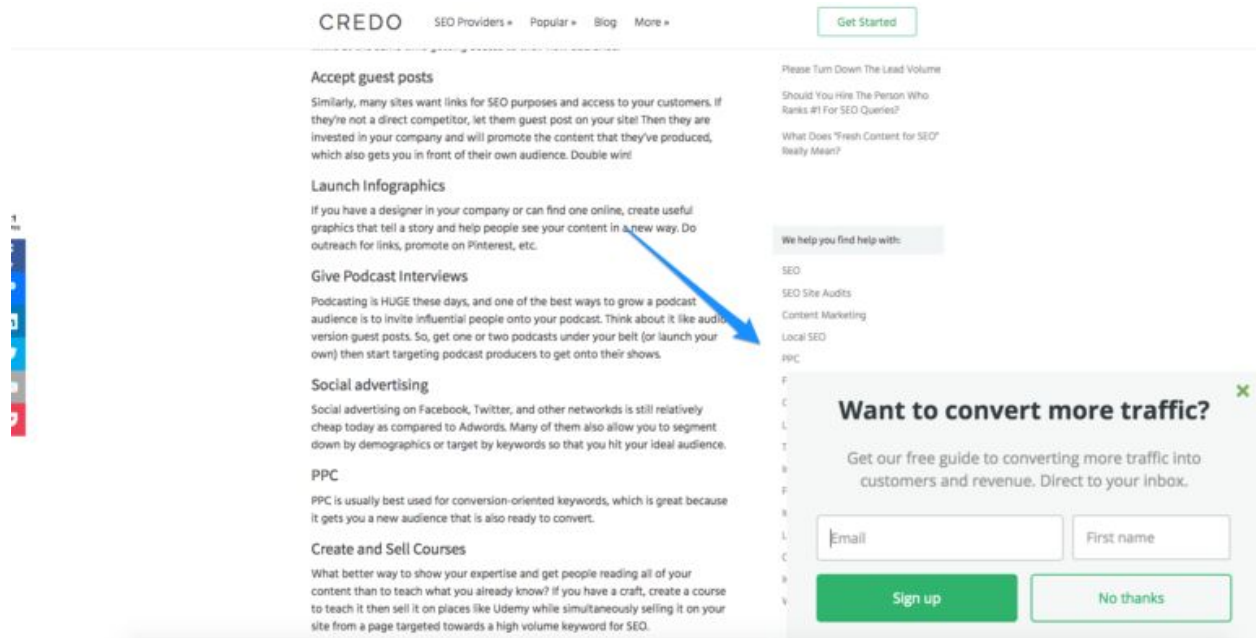
One of the highest leverage things you can do is go to Google Analytics and find your most trafficked pieces of content (Behavior > All page in GA):



Then, find the ones that do not have a tailored call to action on them. This is your opportunity.

Now take those into a spreadsheet and label their topic, then in the next column define the piece of content that you can create in under an hour.

Over the next five days, take an hour each day to create that piece of content. It doesn't have to be amazingly formatted and designed (though it can be if that's how you roll), but get it done in an hour. Then save it as a PDF, put it on Dropbox or somewhere that it can be downloaded, and implement an email capture like so:



Don't get caught up in whether you should implement it as a slider, a layover, or a welcome mat. Using a tool like [Sumo](#) on WordPress, you can make these changes easily.

What is important is implementing something so that you can establish a base and grow from there.

*Done is better than perfect.*

### 3) Implement email captures for long dwell times on a page

One of my favorite strategies to acquiring new email addresses is to target those on your conversion pages who are staying there for a longer-than-average amount of time. You can implement a layover/upgrade that helps them get more information so that then they can feel confident contacting you.

The psychology here is interesting but straight forward.

If someone spends more time on your page than average, then they are highly engaged but likely have more questions, thus they are reading longer. If you can provide them something that gives them answers to their questions (likely one of your most frequently asked questions) and at the same time capture their email address, that is a win for your business.

You do this on your conversion pages and informational pages to help the visitor go deeper. You probably know offhand your conversion and informational pages, but do you know the average time on those pages?

Look in Analytics, then set your upgrade to happen about 2/3 of the way through that. If that drops your conversions, then move it to equal with average time on the page.

Page	Pageviews	Unique Pageviews	Avg. Time on Page	Entrances	Bounce Rate	% Exit	Page Value
	50,685 (% of Total: 100.00%)	44,635 (% of Total: 100.00%)	00:01:44 (Avg for View: 00:01:44)	32,619 (% of Total: 100.00%)	81.64% (Avg for View: 81.64%)	64.36% (Avg for View: 64.36%)	\$0.00 (% of Total: 0.00%)
1. /busy-executives-guide-hiring-agency/	9,979 (19.69%)	8,763 (19.63%)	00:02:37	8,712 (26.71%)	87.06%	84.68%	\$0.00 (0.00%)
2. /	4,429 (8.74%)	3,610 (8.09%)	00:01:36	3,177 (9.74%)	59.54%	52.72%	\$0.00 (0.00%)
3. /how-credo-works/	4,131 (8.15%)	3,748 (8.40%)	00:01:58	3,333 (10.22%)	91.21%	84.58%	\$0.00 (0.00%)
4. /digital-marketing-industry-pricing-survey/	2,303 (4.54%)	1,980 (4.44%)	00:02:44	1,937 (5.94%)	68.73%	68.09%	\$0.00 (0.00%)
5. /ways-to-drive-traffic-to-your-website-2017/	1,772 (3.50%)	1,655 (3.71%)	00:05:26	1,628 (4.99%)	90.48%	90.97%	\$0.00 (0.00%)
6. /charge-prices-consulting/	1,771 (3.49%)	1,693 (3.79%)	00:05:44	1,680 (5.15%)	92.50%	91.93%	\$0.00 (0.00%)
7. /free-consultation/	1,518 (2.99%)	1,329 (2.98%)	00:01:10	953 (2.92%)	91.92%	71.15%	\$0.00 (0.00%)
8. /seo-services-dead/	847 (1.67%)	806 (1.81%)	00:04:18	764 (2.34%)	92.17%	90.55%	\$0.00 (0.00%)
9. /semrush-identify-overtake-competitors-seo-rankings/	840 (1.66%)	794 (1.78%)	00:04:26	748 (2.29%)	90.91%	89.29%	\$0.00 (0.00%)
10. /saas-seo-guide/	678 (1.34%)	578 (1.29%)	00:01:59	508 (1.56%)	83.10%	74.34%	\$0.00 (0.00%)
11. /digital-marketing-industry-pricing-survey/2/	573 (1.13%)	411 (0.92%)	00:01:23	49 (0.15%)	64.00%	24.78%	\$0.00 (0.00%)
12. /digital-marketing-industry-pricing-survey/3/	523 (1.03%)	379 (0.85%)	00:01:24	47 (0.14%)	63.04%	28.30%	\$0.00 (0.00%)
13. /average-seo-consultant-rates/	490 (0.97%)	449 (1.01%)	00:03:33	396 (1.21%)	87.15%	82.65%	\$0.00 (0.00%)
14. /pros/	452 (0.89%)	410 (0.92%)	00:01:48	213 (0.65%)	70.89%	57.96%	\$0.00 (0.00%)
15. /screaming-frog-alternatives/	443 (0.87%)	414 (0.93%)	00:05:21	370 (1.13%)	87.94%	86.46%	\$0.00 (0.00%)
16. /ppl/create-project/step-01/	421 (0.83%)	390 (0.87%)	00:00:03	14 (0.04%)	7.14%	0.95%	\$0.00 (0.00%)
17. /ecommerce-marketing/	304 (0.60%)	277 (0.62%)	00:02:24	210 (0.64%)	82.86%	69.41%	\$0.00 (0.00%)
18. /team/	294 (0.58%)	237 (0.53%)	00:02:20	152 (0.47%)	40.79%	32.99%	\$0.00 (0.00%)
19. /pros/seo/agencies/	282 (0.56%)	261 (0.58%)	00:01:12	118 (0.36%)	81.36%	47.52%	\$0.00 (0.00%)
20. /blog/	263 (0.52%)	235 (0.53%)	00:01:23	44 (0.13%)	31.82%	30.80%	\$0.00 (0.00%)
21. /5-marketing-agencies-phenomenal-startup-marketing/	244 (0.48%)	204 (0.46%)	00:01:35	199 (0.61%)	62.81%	60.25%	\$0.00 (0.00%)
22. /structure-consulting-environment/	238 (0.47%)	214 (0.47%)	00:01:13	223 (0.68%)	97.31%	93.70%	\$0.00 (0.00%)

Keep adjusting until it improves your funnel.

#### 4) Implement lead scoring based on user behavior

Once you've done the above three, or are continually working on them to improve volume and efficiency, you'll be generating email addresses and contacts left and right. Maybe you will even hit the point where you are too busy and can't handle any more business, which means you need to hire or improve processes (or both) to handle more leads.

But what then?

A few months ago I realized that I was getting 400-600 new email addresses every month.

Woah.



But they were just piping into my CRM and my ESP and I wasn't doing anything with them beyond automated drip email followups. There was no personal touch and I didn't know when someone had also looked at pricing or conversion pages but not converted.

I did three specific things:

1. Started lead scoring within [Drip](#) (my ESP) to alert me when an email subscriber did certain actions and was assigned a score above a threshold, which then tagged them as an MQL;
2. Starting piping those MQLs into Slack using Zapier so that I could see them as they appeared;
3. Hired a person in a Sales Development Representative (SDR) role to personally reach out to these MQLs.

This has made a world of difference.

First, lead scoring allows me to define what actions a user takes and a numeric score to apply to them. Once they have done these specific actions, they are labeled an MQL and I receive an email.

Here's part of my lead scoring system:

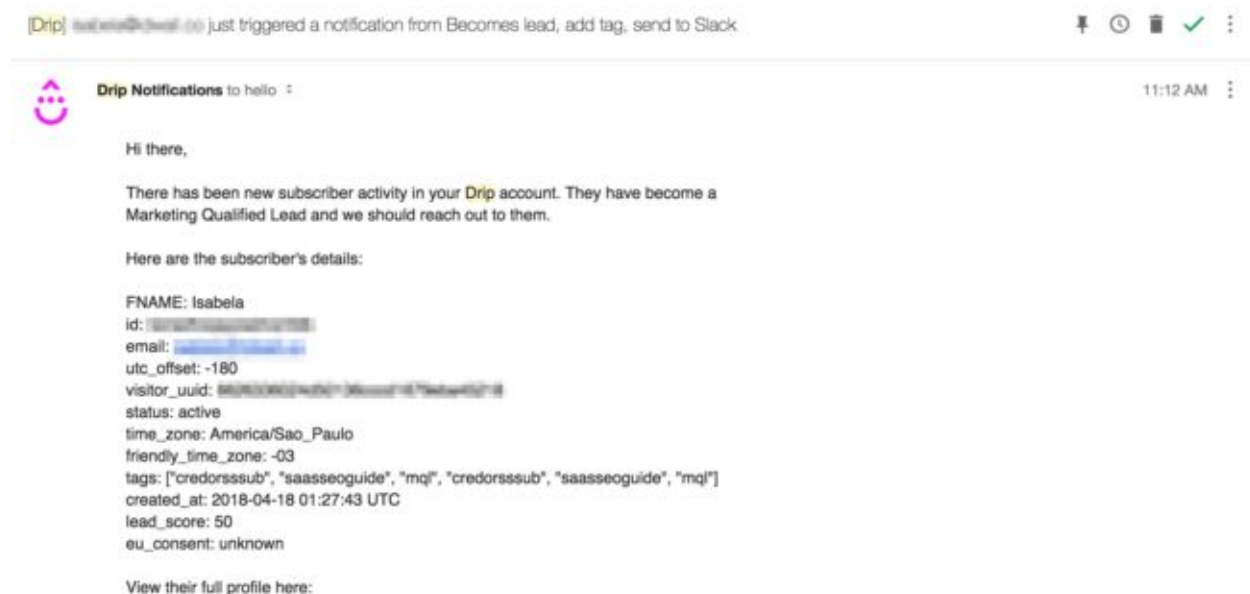
## Special Pages

We add or remove points from the lead score each time a subscriber visits certain pages on your website. Enter a path and point value for each special page, or leave them blank to exclude them from the lead score calculation.

Benefits or Tour Page <input type="text" value="/how-credo-works/"/>	3 points ▼
Example: <b>/tour</b>	
Pricing Page <input type="text" value="/free-consultation/"/>	5 points ▼
Example: <b>/pricing</b>	
Careers Page <input type="text" value="/pros/"/>	-5 points ▼
Example: <b>/careers</b>	

And here is an email I receive when someone becomes an MQL in Drip:

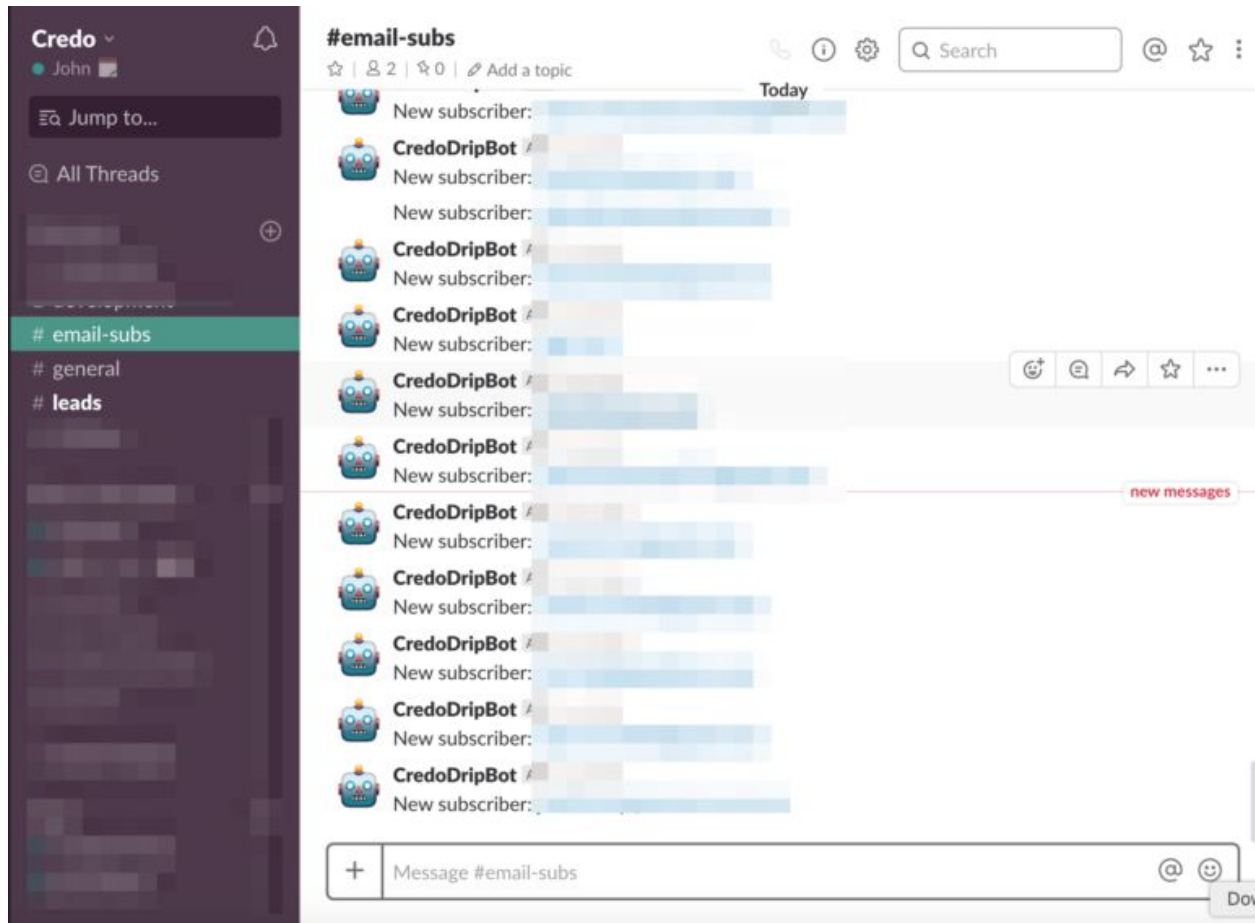




We then reach out directly to them (or rather, my SDR can) to see what they are trying to solve and then try to get a call scheduled with me to discuss their needs.

One of the best things I've done recently is send all of our new email subscribers to Slack. I do need to take this further and also create a separate Slack channel for leads that become MQLs, but this gives me good visibility into if our funnels are working and who is signing up.

My SDR sees this as well and can reach out quickly to good leads (mainly, ones that have a business email). There are many ways to improve this, but sending them to Slack from [Drip](#) using [Zapier](#) is one of the highest value things I've done in the last month:



5) Break forms into multiple pages and elongate your funnel

One thing I have tested a lot is my main form configuration, which currently looks like this:

## CREDO

The screenshot shows a web form for CREDO. The form is titled "Finding the right provider shouldn't be hard" and includes the subtext "We can help. Tell us your needs and we'll follow up." The form fields are: "Your primary marketing need" (a dropdown menu), "First name" and "Last name" (two separate text boxes), "Your business email" (a text box), "Your website (please include http/https)" (a text box), "Current monthly marketing budget" (a dropdown menu), and "Your location" (a dropdown menu). A green "Next" button is at the bottom of the form. To the right of the form, there is a list of client logos under the heading "Some of the 1,500+ companies we've helped include:". The logos listed are ALEX AND ANI, HIRED, The New York Times, THE UNIVERSITY OF PHILANTHROPY, and e-file.com.

Over the last few years I've played with everything from an 8-step form, one for each required bit of information, as well as one long page with 15+ fields to fill out. I finally arrived at this shorter form as the initial conversion. I've done all of this with [Gravity Forms](#).

Based on the answers provided within this form, I send the person to different locations to do something. Some are asked to schedule a call, others are asked to give us more information, and still others we tell them that we will not be able to help for whatever reason (often because they are located somewhere that we do not serve).

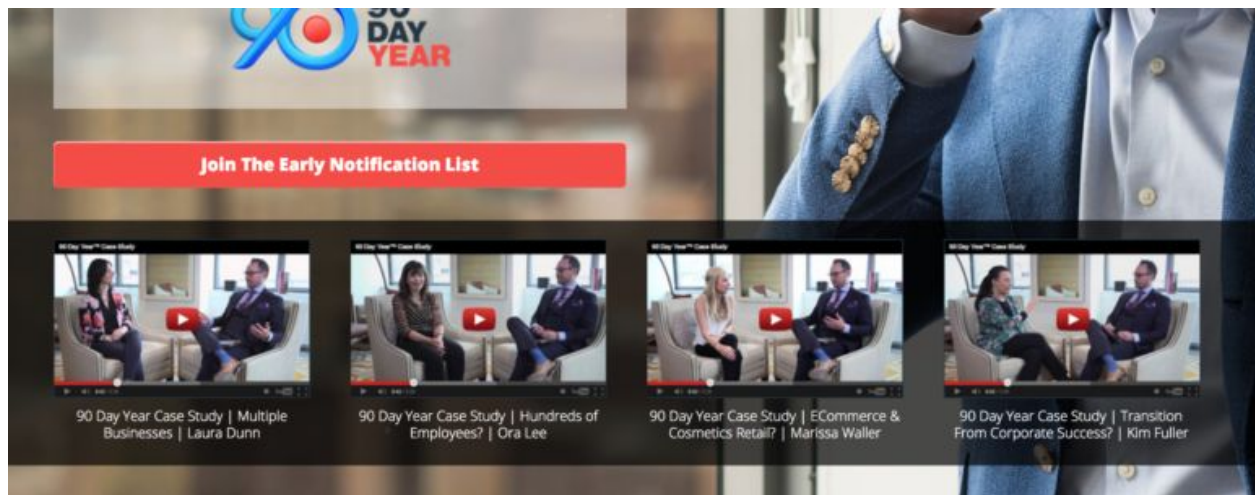
By changing the amount of information I ask for up front as well as adding trust signals (like the Rapid SSL logo and a testimonial) I've been able to dramatically (at least 40%) increase the number of form submits.

### 6) Clarify your offer with video

One thing I have not done widely yet (but will very soon) is use video to clarify what exactly you offer.

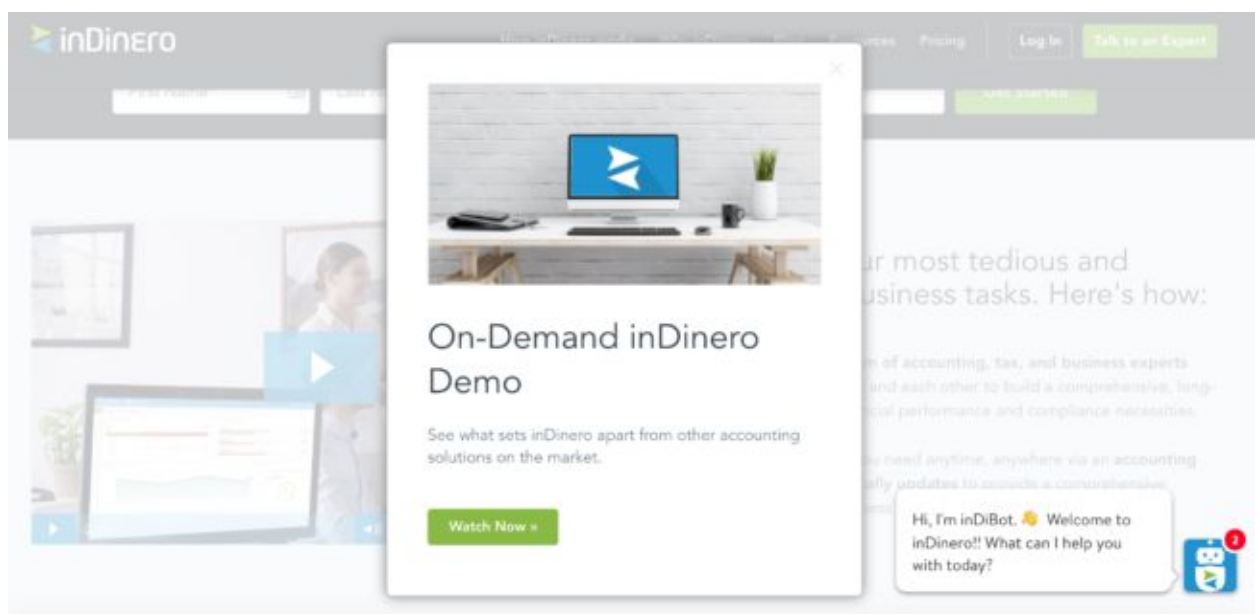


You can do this on your homepage like many companies or even within your conversion funnel on your video pitch. People like Todd Herman use this to their advantage, using video case studies to help with conversion:



Some sites [like InDinero](#) have used videos on their homepage to dramatically improve their conversions. They saw an almost double the amount of conversions by implementing a video on their homepage.

In fact, they now push it hard on their Get Started page:



## 7) Drive targeted paid traffic

Once you have your content upgrades in place and have improved your conversion rates with better forms and possibly video, you may be ready to do some targeted paid advertising through channels like Facebook and Quora to drive email signups that you can then warm up and turn into MQLs and then SQLs.

This strategy involves more education email drips and better segmentation of your list automatically based on user interaction with your content and your site, but it can show huge returns once you are ready.

## What's next

Next, you are going to learn my process for sales from initial client contact to closing them into a sale, as well as some common gotchas that trip up consultants and agencies.

The process is:

1. Follow up quickly to schedule a call
2. What you need to learn on the first call
3. What to do right after the first call
4. How to decide whether to pitch the project or not
5. The scope email
6. The proposal
7. Contracts and gotchas

## Chapter 2: What to do when a client contacts you



### What to do when a potential client contacts you

The first rule of sales in a service business like a consulting agency is this:

***The earlier you reply to a prospective client, the more likely you are to close them into an actual client.***

Over the last couple of years, I've tried to educate businesses that they should speak with multiple agencies and get multiple proposals, to understand what each agency has to offer and be able to compare them in order to arrive at the right decision for their specific business.

And yet, time and time again I see the first agency to respond to be the one to close the project probably 70% of the time.

## How to respond to a potential new client

In your response, you have to include these three points at minimum:

1. Respond as quickly as possible and thank them for contacting you
2. Acknowledge the project they say they're interested in
3. Schedule a time to chat on the phone as quickly as possible for an initial discovery call

This can be a templated response if you like and depending on your lead volume. Tools like Gmail's Canned Responses or templates within your CRM of choice can help. I personally use [HubSpot's](#) and push form entries from [Gravity Forms](#) (on WordPress) to HubSpot via [Zapier](#), but there are many different options. I'm sure you can find one that connects your form technology to your CRM.

I have also seen many agencies send an intake questionnaire that's a page or two long before even getting on the phone with the potential client.

I advise against this because this slows down the process and gives them a chance to never respond to you, even after you follow up multiple times. Some clients that you would otherwise win will simply move on to another agency. You've given them work when really what you need to do is remove friction from their decision to choose you.

If you implement the initial discovery call to determine if they are a good fit for you and have a reasonable project, then you will require less of their time than asking them to fill out a questionnaire. Everyone hates questionnaires anyways, so having a quick call to discuss will also give you better information about them in the long run than they could express in writing.

*Don't send a questionnaire, schedule a call.*

This initial contact is also not the place to tell them all of the brands you've helped and the results you've gotten. If they're contacting you, they're already interested. Don't make them think.

You have one goal with your response: to get them to schedule a phone call with you.



Here is an email template that I use:

*Hi Aleecia!*

*I saw your project for [verdenatural.com](http://verdenatural.com) come through Credo, and I believe we can help you find the right provider for your needs!*

*The next step is a 20 minute call to discuss your project and needs so that we can introduce you to the right vetted providers from our network. I can explain more about how Credo works on that call.*

*Please schedule a call here (NOTE THIS IS A LINK TO MY CALENDAR) and I will call you then!*

*Cheers,  
John*

It's that simple! Notice what I've done:

1. I recognized and thanked them for contacting us;
2. I built trust that we can likely do what they need;
3. I explain the best next steps clearly;
4. I gave them a link so they can schedule a call at their convenience.

Once I implemented this process, it dramatically cut down on the number of emails required to schedule a call and it doubled the number of initial calls scheduled.

That is a big win.

*Get all prospective clients on the phone as soon as possible.*

## Chapter 3: What to learn on the first call



### What to learn on the first call with a potential client

If you've followed my instructions above, you're getting the client to schedule a call with you (when you're available) as quickly as possible. Don't forget to have them include their phone number, as well!

Schedule the call for 20 minutes so that you can:

1. Get an understanding for their project, and
2. Not invest too much time into them in case they're not qualified enough.

*As a side note, if you're getting too many "leads" (may we all be so lucky) that are not qualified for your business and thus wasting you or your salesperson's time, then you may want to look at adding some friction to your lead forms. More is not always better.*

You should have an idea of who your best clients are and the kind of work they've hired you to do that you are best-in-class doing. With that in mind, your goal with this first call at minimum is to walk away knowing if they're a good fit or not.

If they are a good fit, then you can move them forward in your sales process.

You'll also be able to use this process to qualify out the leads who on the surface seem to be a good fit because they were able and willing to successfully fill out your lead form, but when you dig deeper into their business and needs, you realize they're not a good fit for you. We'll talk about this more in a minute.

On this initial phone call, you need to cover all of these points to determine whether you should pitch the work or not:

1. What their business model is, so that you can understand if they're profitable;
2. The type of project they're looking for, such as strategy or services or a combination thereof;
3. Their internal team structure and their knowledge of the marketing channel they're inquiring to you about;
4. Whether the person you're speaking with is the person who has final sign-off and budgetary control, or if they've been tasked with sourcing an agency but ultimately are not the decision maker;
5. Their budget range;
6. Their timetable for wanting to get started.

Thank them for their time and set their expectations about what you'll do next and when they can expect to hear back from you.

Now your work really begins.

## Chapter 4: After the first call



### What to do after the initial call with a new potential client

Assuming the first call with your prospective client goes well, you need a process to follow so that followups don't fail and the process moves forward.

*This part is important.*

#### Follow up with a recap

Right after the call, follow up with the person you spoke with via email to recap the call and reiterate your next steps.

#### Thank them for their time

First, thank them for their time. Regardless of whether or not you ultimately decide to pitch the project, you should be grateful that they decided to speak with you and not someone else.



Recap the details

Second, recap what you discussed on the call. I like to take notes with my CRM (I use HubSpot, as mentioned above) and then use those to write the recap. A CRM should integrate with your email system and allow you to email the prospect from directly within it so that you don't have to move between your CRM and your email client.

Here's a templated response that I use when replying to someone after our initial call:

*Hi FNAME,*

*Thank you for the conversation today! I enjoyed learning more about your business and how we can potentially help.*

*As we discussed, COMPANY is looking for TYPE OF PROJECT. (recap the project here)*

*As I mentioned on the call, my next step is to spend some time reviewing your site and your project to determine if it is the right fit for me as well. I will follow up with you within 48 hours (NOTE: THIS CAN CHANGE IF YOU CHATTED ON FRIDAY, IN WHICH CASE SAY END OF DAY ON MONDAY) with my findings and where I think I can add value to your business. In the case that your project is not the right fit for me, I can suggest some other people you should speak with.*

*Thanks FNAME, and you will hear from me soon!*

*John*

Now you can review their project and website metrics to see where you can add value, and if it's a project that can be successful within the budget they have outlined for you.

Then, decide if you should pitch for the project or refer them elsewhere.

# Chapter 5: Deciding whether to pitch the work



## How to decide if you should pitch the work

Sales is all about determining who the right prospects are and are not, then optimizing your time to focus on the clients you want to sign — not on the ones that are a poor fit for your business.

Hopefully you know who your ideal customer is, in terms of budget but also the type of work they need (strategy, services, or some combination thereof) as well as the marketing channel(s). Once you know who your ideal customer is (and is not), you'll have a much easier time determining whether or not you should pitch the work.

In my experience with seeing over a thousand projects introduced to marketing providers, the six factors mentioned in the “What to learn on the first call” section are the ones that reliably help you understand whether you should pitch the work or not.

Some of the factors to avoid are:

1. Unrealistic expectations or timelines
2. No or low budget

3. No resources to get things done
4. Their last four agencies haven't worked out
5. Going out of business "unless they get help"

I love that so many in the SEO industry are helpful and genuinely good people who want to help others, but if you start taking on clients that can't pay you what you need to operate a profitable business or have had issues with many other agencies, then you're doing yourself and your business a disservice.

If I had a dollar for every time I heard an agency say that they "pitched the work, but set the budget high" I'd be financially independent and retired to a mountain town in Switzerland by now.

Hear me loud and clear here:

*You do not have to pitch every project that falls into your lap.*

If the project doesn't meet your minimum project budget, the type of client you can get outsized returns for, or is not within your core competency (your [zone of genius](#)), then you should not pitch the project.

Let me explain why.

If a client is below your minimum project threshold and you pitch them, you've wasted two people's time. You've wasted your own time by creating a proposal and potential project plan, and you've wasted their time because they took time out of their day to review something that they'll never sign off on.

Second, if they negotiate back to try to get the budget lower, you're going to spend your time to get a project that is smaller than what they ideally need and can afford. You're literally spending time to make less money, when you could take that time to pitch and negotiate with someone who can easily afford your services.

Should you sign the project that is smaller than or right at your minimum while at the same time being at very top end of their budget, you can rest assured that this client will take up more time than they're paying for because they feel pressure to make it work quickly. Unless you set expectations explicitly and are very good at saying no to requests for work that are outside of the scope of what they're paying for, this project will quickly snowball and take up too much time, thus putting it in the red.

Don't pitch a project that's very likely to go into the red budget-wise. That is Business 101, and you will regret it. I promise.

## How to decline a pitch

If you have done your due diligence and decided that the project is not a good fit for you to pitch and take on, then you need to respond to the client to that effect and with a reason why.

Here is a template that I send:

*Hi FNAME,*

*Thank you for taking the time to speak with me last week and for your patience as I reviewed your metrics using (tool 1, tool 2, etc).*

*After our conversation, looking at your metrics, and assessing my/our current availability I do not believe that we will be able to achieve the results you want because (YOUR REASONS).*

*I wish you well in your hunt for a (marketing/development/etc) partner.*

*NAME*

The goal here is to have a straight forward response that makes it clear that you will not be pitching the project. It is important here, if you do not want to take them on at all, to not leave it open ended where if they say they change something then you will reconsider.

If you decline to pitch the project because the budget is too small but you'd love to work with them if their budget was bigger, then make that explicit. Sometimes clients try to quote lower than they can actually, when really this means that they simply need to see a pitch. If they respond with this, then you can make a decision whether or not to send a proposal.

## Chapter 6: The scope email

After you decide to pitch the work, it's time to send an initial scope email to make sure that you and the client are on the same page. I always set the expectation with them before we get off the discovery or follow up call that this is how I work so that they understand what will happen next.

Many companies, especially larger companies, have a set procurement process that involves some combination of speaking with a lot of providers, getting initial scopes and pricing, creating a shortlist of potential vendors, passing the project to procurement or legal, and then making a final decision and pushing it through to a signed contract.

Some clients are less complicated than this, but as you move up the budget (and value) chain you'll run into this more and more.

In spite of this, I **still** believe you should send what I call a "scope email" to your initial point of contact before you ever send a proposal.

Here is an actual scope email I sent to an SEO client that ended up signing. This came about after two conversations with various people on the team, time on their end to think through what we discussed and the direction I directed them, and a few changes of direction that I took into account and believed would provide them value:



me to [redacted]

May 3

Thanks [redacted] I appreciate the feedback and your updated thinking. I will definitely take this into account.

Here is what I am thinking.

We should start off with an individual project that is aimed directly at [redacted] SEO opportunities and a high level strategy. I actually just completed one of these for another big marketplace client like you, and it's going incredibly well.

This project will take me a couple of weeks to deliver. I'll look at your site to identify major structural issues keeping you from ranking. This is basically a focused audit to identify the major areas to improve. This one will cost \$5,000. We'll have a call at the start to make sure I am focusing in the right areas, then I will take two weeks to do the audit and will send it to you with a followup call.

I will also look at your top 3 competitors ([redacted]) and from there can put together a more holistic strategy. This will cost \$7,500 as it is quite a bit more research and higher value. This will also take 2 weeks of time and can be done after the initial audit listed above is done.

Since your team wants ongoing support as well, I then propose that we do a retainer where we do either 2 or 4 hour long calls per month. With each of those I also do an hour of investigation based on the call. These run either \$2k/mo for 2 monthly calls or \$4k/mo for 4.

Let me know how all that strikes you initially and what questions you have. Then I can write up a more formal proposal.



I closed a \$40,000 consulting project off this email.

What to include in the scope email

A scope email should include:

- A recap of the discussion you had;
- The project you propose to start with, and the length of engagement;
- Pricing;
- What could happen after that project finishes.

This scope email accomplishes a few things.

First, by recapping the discussion you had you let them know that you listened to their specific needs and are taking that into account with the project you are proposing.

Second, by specifying what you think the project should look like you show them that you have thought deeper about their needs than a generic services company or consultant might. You've taken the time to understand their business and to propose the right project based on your experience with companies like theirs.

Third, by giving them pricing you get those expectations out in front before you dedicate time to creating an official proposal. If your pricing is too high for the client, then this is the time where they can tell you. You can then decide if pricing is negotiable (by limiting the scope) or if it is time to walk away and move on to another client.

Fourth and finally, you leave the door open for additional work after the initial project is done (if this is within how you work with clients). This sets the expectation that you are looking at them as a potential ongoing client, not just a one-off project. If you do not do ongoing work, then you can make it explicit that this is a limited scope project.

The scope email can save you hours of wasted time putting together proposals when you and the client are not on the same page on some aspect of the project, whether scope or budget.

Once they have come back and said that it looks good, then you can put together the proposal.

# Chapter 7: The proposal

Once you have learned about your client's needs, decided to pitch the work, and sent them a scope email that they responded to positively, you are ready to create a proposal.

If you have not done the above already, then go back and follow the process. If you have, keep reading.

## Intro to writing a proposal

As a consultant or agency selling to SMBs, don't get bogged down in the minutiae of consulting proposals. You do not need fancy proposal software or fancy formatting to send a proposal and sign high four or low five figure monthly consulting contracts.

If you are an agency or consultant selling to larger enterprises, then you should consider engaging with a lawyer to help you craft language that will protect you in the event that something goes sideways with the project, either your fault or the client's.

I've signed many high four to low five figure consulting projects off of proposals sent using Google Docs with my company logo at the bottom. I save the proposal as a PDF and send it to the client as an email attachment.

Of course, none of this happens before I have their permission to send a proposal formalizing the things we've discussed on the aforementioned calls and in the scope and subsequent emails.

## Structuring the proposal

There are five main parts to every proposal:

1. Summary
2. Project scope/focus
3. Project structure
4. Needed access/requirements
5. Pricing



Here is an explanation of each section.

## Summary

This section is simply 2-3 sentences explaining what to expect in the proposal. It is a synopsis, no more and no less.

Here is an example, an executive summary sent to a client that signed for a \$12,500 audit:

### Executive summary

This document covers a proposed SEO project to take place between John Doherty, founder at Credo (HireGun LLC) and [REDACTED]. This proposal was requested by [REDACTED] and [REDACTED].

In this document you will find:

1. A proposed project plan
2. Outline of project pricing
3. Next steps

## Project scope/focus

In the next section, recap the focus based on the client's goals and what the client will receive in the project.

I like to keep this as simple as possible.

At the top I say in a bulleted list exactly what the client will receive. Underneath I then say why this is the focus.

Here is an example:

## Project Focus

This project will focus on two main objectives:

- Technical wins on [REDACTED] to help the site rank better for the queries it is already targeting;
- A competitor dive to understand how they are outranking [REDACTED]

The goal is to uncover specific strategies that [REDACTED] can execute upon to begin taking more market share from competitors.

There will then be the option of ongoing consulting to answer questions and review work as it is implemented by the [REDACTED] team.

## Project structure

Next, you will discuss how the project is structured for success. This is a deeper explanation of the bullet points in the focus section and explores how and when you will provide phone calls and consulting based on what you are delivering.

This is also a great opportunity to reiterate if ongoing work could be signed based on the work agreed to in the proposal and contract.

Here is an example:

## Project Structure

The first part of the project will be the technical review of [REDACTED]. This will be conducted by John personally using a combination of tools like DeepCrawl, SEMrush, Screaming Frog, and more.

The technical audit will take two weeks from start to finish. There will be a followup call the week after the audit is delivered to cover questions.

The second part of the project will be the competitor audit. John will specifically look at [REDACTED] (specifically focused on delivery keywords) to understand how they are ranking so well and the initiatives they have undertaken to beat [REDACTED] in SEO for delivery-related keywords.

The third part of the project will be ongoing SEO strategy support on a monthly retainer basis, if desired.

## Needed access/requirements

This section is optional, but over the years I have found it helps clients understand specifically what they need to give you in order for the project to be a success.

For the example project I am using here, it was a technical SEO audit so I needed to make clear what data I needed access to from the client in order to do a complete job. Often clients will ask you to sign an NDA as a part of the process as well, which is par for the course and you shouldn't have a problem signing.

Here is what I included in this section:

## Needed access

In order to do a complete job auditing [REDACTED] I need full access to:

- Google Analytics (or other analytics platform)
- Google Search Console
- Bing Webmaster Tools (if present)
- Any rank tracking currently in place
- Any past audits [REDACTED] has had completed.

I have made one change to this section. After I sent this proposal, the client's legal team came back and wanted clarification on if I had my own access to the tools I stated I would use or if I would need the client to get their own access.

As such, in future proposals I am clarifying the tools that I already have access to and thus will not need the client to procure subscriptions to.

## Pricing

Finally, you need a pricing section in your proposal. But you have to do it right.

Many consultants and agencies present a "menu" of services that the client could choose from.

What is more effective is doing the pre-work we have talked about in this course to define exactly what the client needs and then quoting that specific work.

Here is pricing I did specifically for this client:

## Pricing

This are proposed timelines for each part of the project.

Deliverable	Scope	Delivery date if project starts May 21	<u>Followup</u> Call	Price
Kickoff		May 21		
Technical audit	Audit of [REDACTED]	June 6	June 12	\$5,000
Competitor research	Audit of [REDACTED]	June 26	June 28	\$7,500
Monthly retained consulting	4x monthly calls	July 1	--	\$4,000
Total				12,500
Monthly (beginning July 1)				4,000

Notice that I have not talked about the hours that the client will get.

This is a point of contention in the consulting world and I know that many agencies do tell their clients how many hours they are buying.

I recommend that you avoid talking about hours at all costs. If you are pricing yourself according to the value you are bringing and what you are delivering, it should not matter how many hours you are working.

Clients should care about the deliverables and results, not the hours you are working.

## A word about pricing

Pricing is outside the scope of this course, but I have written about it extensively on the Credo blog as well as within [the Digital Marketing Pricing Survey](#) released in early 2017.

## Software to use

As I said at the top, you do not need fancy software to send proposals that turn into high-paying signed contracts.

The best tool is the one you use.

If you're a solo consultant just building your business, you should use Google Docs. Make sure you include your name or business logo in the footer (Insert > Header & Page Number > Footer) to make it a bit more professional. Then export this as a PDF and send it to your client as an attachment.

If you're a larger business and maybe have multiple sales people working across many proposals, you might need a proposal tool that allows you to track these more easily.

In that case, we recommend [Proposify](#). Run out of Canada, Proposify specializes in proposal software that is easy to use and enables great sales flows.

Proposify also integrates with most of the well-known invoicing and business management tools such as Zoho, HubSpot, Xero, FreshBooks, and more.

## How to send a proposal

Here's where the rubber meets the road with proposals. Many consultants and agencies will skip the process of the scope email and go straight to a proposal.

I've spoken with many agencies and consultants who complain that they never hear back from prospects once they send a proposal.

This is because you are doing it wrong. There is a proven process for getting proposals read and agreed to before sending a contract.

There is one step that most providers miss that will change your close rates for the better, I promise:

## *Schedule a call before sending the proposal*

Since you have ongoing communication with the client, email them to tell them that you are almost done with their proposal and would like to schedule a call with them to go over it before you send it.

Here's what I send:

*Hi [client name],*

*I wanted to let you know that I am almost done putting together the official proposal covering the project we've been discussing for the last few weeks.*

*Before I send that, I'd like to get a call on our calendars so that we can discuss anything within the proposal that is not clear. I find that this helps expedite the process on both sides and makes contracts move better through your organization as well.*

*I'll send your proposal through [insert day], and have these days and times available:*

- 1. Day 1 and time*
- 2. Day 2 and time*
- 3. Day 3 and time*

*Please let me know which of those, if any, work for you and I will send a calendar invite!*

*[Your name]*

Once a call is scheduled, then send the proposal!

# Chapter 8: Contracts

Before we begin this section, note that I am not a lawyer, have never studied to be a lawyer, and any advice given here is not from a lawyer but from the School of Hard Knocks.

Contracts are no fun, but they are important to cover your liability with projects. Some consultants/freelancers choose to not work with officially signed contracts, but I recommend that you send them even if they are just a formality. I've been known to resend the proposal I sent with the Terms and Conditions and a signature at the bottom for them to sign and return.

## Why you should *always* work under a contract

A contract is a legally binding document, which is why it should be reviewed by a lawyer for enforceability. If you are working with large enterprises with big budgets, then you should recognize that they have whole teams of lawyers who are responsible for reviewing all contracts and looking out for their business's best interest.

*Their best interest, not yours.*

When you have a signed contract with a client, you have spelled out the terms and conditions under which you are working, such as:

- Where you will work from
- Access and tools you need to do your job
- Who is responsible for incidentals
- What happens if the project runs long
- The advance time needed to end a relationship (assuming you work on a monthly retainer)

Clients are generally good and honest, but they are looking out for their own good and not yours. With a contract, you cover your own liability and have it in writing.

Should you let the client use their contract?



Sometimes large clients will ask to use their own contract, or say that it will be quicker to use their contract.

If you have previously hired a lawyer to help you with the legal language in your contracts, then I urge you to use your own contract with openness to their legal team redlining areas of your contract that they would like changed. It is then up to you to decide to change those or not.

The most common areas that they will push back on are:

- Net payment terms (eg you want prompt payment, they want net-60 days)
- Notice time required to get out of a contract
- Ownership of materials created

For each of these, you must decide what is right for your business.

## Payment terms

Many clients like to elongate payment terms so that they can keep more cash on hand to invest into growth. While this is a good strategy for them, this can mean that you could not see payment for as long as 3 months after the work is completed if you invoice once the work is done and they have another 60 days (two months!) to pay.

One lesson I have learned the hard way is that when a client negotiates for longer payment terms, they will still be late paying you.

This makes it very hard to run a profitable business as you have *a negative cash flow cycle*. You need to get paid as quickly as possible and upfront if possible.

I will sometimes allow Net-30 payments, but when I do this with a client I also negotiate to send the invoice at the start of the project, or half at the start and the other half at the end. This way, you will be paid much sooner for the work you have done.

## Gotchas

There are a few mistakes you can make in contracts that you should be sure to avoid. Most people are honest, but remember that lawyers/procurement/clients are looking out for their good not yours. You are your best advocate.

*Remember, I am not a lawyer nor does anyone at Credo claim to be. These are simply lessons that we have learned over the years that have literally cost us money. Please check with a lawyer as you are creating your contract.*

The main gotchas that I see in contracts are:

- Long leads on payment terms;
- No minimum advance notice required before ending a contract;
- Financial obligations, such as paying their legal fees should something go wrong;
- No provisions for if the client is acquired

### Long leads on payment

This point was covered above so I will not belabor it, but you should build into your system to get paid in a timely manner.

If the client requires that you should cannot bill them until work has been completed and they require a 60 day net payment term, then it will be at least three months before you are paid for your work.

Try to negotiate at least 50% of the expected first month of work to be paid up front. If a client balks at this, then you may want to re-evaluate if they will be a good client for you at all.

### Minimum notice

You should include in your contract that you require 30 days notice should the client want to discontinue the work before the contract length is up. Should you unexpectedly lose a client (regardless of fault), this will give you time to transition the client well.

This will also give you time to pick up a new client to smooth out your revenue.

I recommend a 30 day notice because a sneaky client could use a shorter period to pay you less than you were expecting for the next month. I had this happen once and it cost me \$5,000.

You may also want to try to include a termination fee should the client end the contract early. You should of course clear this with a lawyer and also expect that clients will push back on it. In that case, same as with advance payments you should question why they are pushing back and if it is worth potentially not signing the client to keep it in the contract.

### Financial obligations

Some clients may try to add in language that leaves you on the hook for any legal bills that may need to be paid, regardless of who is found to be at fault.

While you will hopefully never be sued, it is better to cover yourself from the start than to learn a very expensive lesson in the future.

### Provisions in case of acquisition

If you are working with startups or quickly growing companies, there is always the chance that they may be acquired or significantly change business strategies while you are working with them.

In either case, you need to cover yourself with a clause that provides that you will have the changed to be retained or that the rest of the money owed you in the contract will be paid.

This is another area that a client may try to redline out of the contract, but is a helpful thing to have in place should you need it.

## Liability Insurance

Hopefully you will never need to use it, but liability insurance is a great thing to have just in case something goes wrong. In the case of larger clients such as publicly traded companies, they may even require that you have it before they will sign a contract with you.

Fortunately, business liability insurance can be quite affordable from providers like Hiscox which is underwritten by Lloyd's of London. My business has \$1,500,000 in liability coverage and I pay \$150/yr for it.

Sometimes it's better to have peace of mind than to need it and not have it. I highly recommend liability insurance.

# Conclusion

To recap, here is what you need to do when a new potential consulting client first contacts you or your agency.

**First, speed is of the essence.** While we want to believe that the best pitch will ultimately win the business, experience tells us that it is most often the first person to respond who actually gets to pitch and sign the business.

**Second, get the potential client on the phone as quickly as possible.** Don't rely on email, as you can gain way more information on a 30-minute call than in a string of emails. People are busy and you don't want to create more friction for them. Get them on the phone.

**Third, you need to send a followup email** within a few hours of the phone call where you thank them for their time, recap what you discussed, and set their expectations for what your next steps are and when they'll hear from you again. Feel free to use my template and adjust it for your specific needs.

**Fourth, decide if you want to pitch the project.** Don't pitch projects that are too small, outside your/your agency's zone of genius, where what you have to offer is not their highest leverage option, or where they're not set up internally to make the project successful. Your project will not succeed if any of these are true.

Once you pitch the project, you need to:

**First,** send a scope email to make sure that what you plan to propose to them is what they are expecting. This will save you time and effort should you not be on the same page and gives you a chance to correct your understanding and pitch the right project.

**Second,** tailor the proposal to their specific project and schedule a followup call to discuss it before you send the proposal.

**Third,** have a followup call to talk through objections and then send the contract to be countersigned.

Good luck

If you've gotten this far, then congratulations because you are on your way to closing bigger and better projects and clients and thus growing your consulting business.

If you have further questions, feel free to get in touch with me personally!

Email: [john@getcredo.com](mailto:john@getcredo.com)

Twitter: @dohertyjf

Best of luck to you in your business!

John Doherty  
Founder, [GetCredo.com](http://GetCredo.com)

