

Marketing Proposal Template

Whether you are pitching a branding, marketing, or advertising campaign, you need to create a proposal that explains how you will help your client promote and expand their business. You can adapt this template to suit just about any marketing project.

HubSpot Tip: Every proposal should be client-centered, so be sure to update this template to meet the specific needs of your customer.

Our Company and Team

Whether you are submitting this proposal to a long-time or brand new client, it is always a good idea to provide a brief introduction to your company and team. No more than a paragraph is needed. Include key information like when and by whom your marketing firm was founded, what your major strengths are, and any similar work that you have completed in the past.

Our Services

Provide a summary of the marketing, branding, and/or advertising work that your company does. Be broad. Include all of the kinds of services you offer, even ones that you might not be proposing to this client at this time. You can organize them in a bulleted list like the one below.

- Service 1
- Service 2
- Service 3

The Proposed Team

In this section, you should provide information on the relevant skills and experience of your proposed team members. Provide brief profiles of each of the staff who will work on this project, indicating their name, title, role on the project, special skills, relevant qualifications, and education. You can also mention successes on similar work in the past. Consider organizing this section with bullets, as shown below.

- Team Member 1, Title – Profile
- Team Member 2, Title – Profile
- Team Member 3, Title – Profile

HubSpot Tip: You can include professional headshots for each of your team members to personalize your proposal. Be sure that the look of the photographs is uniform across the team members and matches the overall design of the proposal.

Project Scope

Now that you have introduced your company and team, you should indicate your understanding of the client's needs and the project you will conduct in order to meet their specific requirements.

Summary

Begin by giving an overview of the project. Items you might discuss include the situational analysis, challenges and issues, and the target market and customers. This section should set the stage to introduce your proposed solution.

Proposed Solution

Explain to the client the activities you will undertake in order to meet their needs. If possible, break the activities into phases. You should also indicate any deliverables that will be submitted to the client under each phase. Organize these items in a table like the one below.

Phases	Activities	Deliverables
1	<ul style="list-style-type: none">• Activity 1• Activity 2	<ul style="list-style-type: none">• Deliverable 1
2	<ul style="list-style-type: none">• Activity 3• Activity 4• Activity 5	<ul style="list-style-type: none">• Deliverable 2• Deliverable 3
3	<ul style="list-style-type: none">• Activity 6	<ul style="list-style-type: none">• Deliverable 4

In some cases, just a table may suffice, but you might also consider including additional narrative to explain your methods more fully.

Projected Outcome

In a paragraph or two, describe what your proposed solution will achieve for the client. Try to ensure that your outcomes are measurable. Provide a brief explanation of how you will evaluate success on this project.

HubSpot Tip: If there are key parts of the project that the client will be responsible for, be sure to indicate them in your proposal. Don't surprise your client with requests for work once the project has started!

Project Schedule

After describing the steps in your project plan, you should align them to a timeline to show the customer how the project will unfold and when each step will occur. Including a schedule boosts your credibility and shows the client that you have a plan for executing the project on time. You can use a simple table, like the one that follows, to depict the project schedule.

Phase	Activity	Start Date	Completion Date

HubSpot Tip: Be sure to set reasonable deadlines. It is much better to turn in a product early than to set an unreasonable deadline and be forced to make a late submission!

Your Investment

This section should outline the cost to the client of all of the necessary activities and items to complete this marketing project. Some of your costs might be billed with an hourly rate and others might be charged as a flat fee. Keeping with the same organization by Phase and Activity that you have used throughout the proposal, present all of the costs clearly in a format like the one below.

Phase	Activity/Item	Hourly Rate/Flat Fee	Estimated Hours/Quantity	Price
TOTAL:				

HubSpot Tip: Accuracy is important! Consider reproducing this table in a spreadsheet program like Microsoft Word and doing the calculations there, then copying them into the template. Nothing looks more unprofessional than a math error in the middle of your proposal!

Contact Us

Make your contact information impossible to miss, in case the client has any questions as they review your proposal. Include multiple ways to get in touch with you quickly, for example, an email address and a phone number.

HubSpot Tip: Make getting in touch as easy as possible for the client. If you know your client's preferred method of communication is email, then be sure to provide your email address and be ready to respond quickly. If they prefer to speak by phone, give them a number at which they can reach you anytime during the workweek.

Contract and Signatures

Explain the next steps required to approve the proposal. You most likely need your client's signature, so include customized signature lines for everyone who needs to sign, like shown below.

[Name], [Role] [Name], [Role] [Name], [Role]

You should also include your company's contract details indicating the specific terms and conditions for this project.

HubSpot Tip: Including signature lines directly in the document can speed up the approval process by limiting the number of documents that need to change hands.

Additional Materials

If you have additional information you would like to provide to the client, you can include it in an Appendix. Some examples might include case studies of past work, a portfolio of your branding or advertising work, or sample products that you have created for past clients.

HubSpot Tip: Past experience is the best indicator of future success! Including examples of your best past work at the end of your proposal provides evidence of your knowledge and capabilities.