Dream of Travel Writing

How to Close the Deal: Proposals and Phone Calls that Get Results

This week in part four of our series on travel content marketing we're going to talk about how to close the deal. How to have the phone calls that get your prospects to finally say yes to what you propose and what to propose to make sure that they do say yes. I know what this concept of proposals is probably going to be new to a lot of folks because I think usually when we're setting up writing gigs with folks that we haven't met in person or just generally in a freelance capacity outside of day job is that we don't send a full proposal, the type of which people bidding on a construction job or setting up an entire website for a company might send. But this is one of the things that can actually really set you apart from other writers, and also accomplish one of the very important things that you need to do with any prospects that you found cold through the type of research we talked about in previous weeks, which is establish trust.

Let's talk about how to do that. There's three main things we are going to look at within the concept of proposals and phone calls. Because they are very related in terms of their purpose. So first I want to talk about how to focus what you say on your phone calls with your prospect and make sure that you are not doing most of the talking. Even though I think it's our inclination to do a lot of explaining about how we work that's not actually what closes the deal. Then we're going to look at the questions that you need to make sure that you're asking on that phone call to be able to write the best proposal to convince your prospect work with you. Then we're going to look at step-by-step the formula that I used to put together content marketing proposal.

I just wanted to say I'm so excited that somebody who's been doing these calls every week, Donna Long. She wrote me just yesterday to say that she has not been able to follow the at-home Pitchapalooza course that we're doing pitching magazines because she's been doing pitches for this content marketing writing that we have been talking about in these webinars and she says she's already landed one, and she has conference calls and emails scheduled with another 6! So, I am super happy for her but I just wanted to share that with you to show you that it's not that hard and it doesn't take that long and you really can get this type of work set up very quickly.

Let's dive into what we're going to talk about today.

We looked last week, and whenever we talk about pitches we always start by asking ourselves what is the real objective? What do we really need to accomplish with this particular thing that we're doing? And in this case, unlike our pitch letters, where the objective is just to get them to respond. The object of our phone call is to get them to make a very small step but ask us for something. To show, not just that they're interested in hearing what we might have to offer but, they are potentially interested in working with us. So when you send somebody a pitch letter like we talked about last week and you wrap up by saying, "Hey, do you have 5 or 10 minutes?" or "We could hop on the phone next and talk about how we can work together." That's a little bit of an ask but it's the kind of thing where somebody might do it just because they're curious, even if they're never really going to pull the trigger. But once you've had that phone call if somebody, and I'll give you some exact language on this at the end, when we ask them if we can put together a proposal and how to work together that's them saying a more significant *yes* to the possibility of actually paying you to do some writing for them.

Now, one of the most important things in this whole process of getting cold content marketing gigs is to not battle up hill. I talked in the first week of this series about all the different types of gigs out there but then in the second week when we looked at how to find them I mention that it's really important not to just look for whatever is there. Not to just find websites that need help, to find the ones that you were the most well matched to. The reason for that is that it's much easier for people to say yes to you if they can clearly see the fit, it they can clearly see you have the background, if it looks perfect to them. It's the same thing with these proposals and these phone calls, we want as much as possible to be tuned in directly to what these prospects need. So, the interesting thing about that is that often means that we're not going to do very much of the talking. That we need to do a lot of the listening because it's by listening that we get the information that we need to put together the proposal that they say yes to. So the entire time you're on the phone with your prospect is really important to keep in mind that you don't want to scare them. Right? I think we are often scared making these phone calls, I remember the first time I pitched content marketing and things like this cold I just sent out emails to people who had concierge travel booking companies. I can picture it I had a different apartment at the time I was sitting in the couch in my apartment getting ready to make these phone calls and I was just like scared for no specific reason. If I didn't get the gig, fine. There was nothing to worry about, I wasn't scared of stuttering on the call or anything like that. It was just the sort of unknown and when you have these phone calls that is one of the biggest things that you can only get over with practice. It's going to be hard every single time, until it's not. There's nothing I can really say to you to make that less, But, knowing that you can make sure that you're making it as easy for yourself as possible so that there's less to be afraid of.

On the call I mentioned last time that there's three things that we want to accomplish in our pitch. We want to let them get to know us, like us, and trust us. The purpose of this phone call is to really cement these three things (know, like, trust) that you need to close a deal like this. So I split up the types of things that you're going to do in your phone call into these three categories: know, like, and trust. Now when you first get on the phone with somebody that you sent a cold email to and they're curious enough to set up a call with you there are some questions that they have that all revolve around *why*? Answering those questions is addressing the *know* part of *know, like, trust* so even if they have decided to get on the phone with you there's typically some things if they're not sure about. You need to establish a baseline level where you're on the same page about what is going on in order to move forward and conquer these *like* and *trust* signposts that we also need to get past. So the things that pretty much everyone will always want to know, whether they ask you or not, and they usually will, is *why* you reached out in the first place. Why you reached out to them specifically, and why you can help them.

I think that we often get stuck on what to say in answer to some of these questions, and I want to circle back to that later. But first I want to go through a couple things about know, like, and trust and then I promise you we are going to circle back about how you ask and answer each of these specific things. So, when we are establishing *liking* with our prospects (for them to like you, and hopefully for you to also like them). As a side: If you don't like them then don't offer to put together a proposal for them. If you see some warning signs, if they start telling you about these people that they have worked with in the past and they start saying very nasty things about these people. This is a very clear sign that this is not going to be a good fit. I talked in the "identifying prospects "call about *fit* and how it's very important. There's a very very big sea of potential content marketing clients out there. It's not worth your time to work with ones that are bad fit because there will be friction. It will affect your other writing, it will affect your personal relationships, and it will probably, in the short if not long-term, affect your ability to get paid by the prospect. Eventually the relationship will end, and it will not end well. So you always want to go to the best fit possible, from the beginning, to ensure a good long-term collaboration.

This is why they *like-factor* is so important. As much as you're trying to figure out if you like them, you also want to get them to like you. You do that by showing them that you understand what they're going through. This can be in terms of learning about marketing or social media. This can be as a small business owner or as an expat living in another country, somebody learning another language. Any point of commonality that you can find where you can show them that you are empathetic of their situation. You want to show that you have a similar background but you also want take it one step further. You want to help them see that you really get them, because this feeds into our next one, trust.

How we get, in a very short phone call, in one e-mail or a couple e-mails, somebody to trust us? This is huge. This is the whole point of this phone call. It is very very difficult to establish trust over emails. I can't even tell you how surprised I am at the differences that pop up when I've been emailing with somebody and then we get on the phone. I see this when I do interviews for articles, I see this when I do interviews for people to write for us at the travel magazines database. It's almost like we all speak two languages today. We speak a written language, and we speak spoken language. I'm sure that as writers we all know how different the tone of your writing can be than how you are in real-life speaking. The thing is that how you are in real life speaking is how you go about doing your work. The actual format, style, and tone of your writing is an end product that's been polished.

In terms of working with somebody it goes so far in establishing trust to hear that person's voice. Get to know their personality and understand that that personality is trustworthy. That's why no matter how scary it can be, like me sitting there on the couch freaking out about these phone calls that I had to do, it is so important to get on these phone calls. It goes so far in establishing trust. To hear that person's voice and to get to know their personality. To understand that that personality is trustworthy. I can't tell you how many times I've seen people try to set up travel writing gigs just over email and it seems like it could be a good fit but people aren't getting back in time. If you don't feel like you know the person and like them and trust them then the prospect isn't incentivized to work with you to start that project. So the most important way we get over that is getting on the phone. But once on the phone you use a tone of voice, experience, and anecdotes about other things that we've done to show that they can trust us. To show that we go about our work in a professional manner. To show that we are called trustworthy, intelligent individuals that this prospect can trust with an important piece of their business.

One of the most important things that you want to do with this kind of marketing gigs is to show that you know what they need better than they do. This is tricky, it's tricky in theory but not in practice. It's not so hard once you wrap your head around it. I mentioned in one of the earlier calls in this series about how these, particularly if you're approaching small business owners or small tourism boards, these people are harried individuals. They have a very very very lot of stuff on their plate and they would love someone to help them with that but they need to know that that person is going to do good job. In order for you to show that you know what they need better than they do, and they can trust you, you need to show that you know the subject matter better than they do.

We're going to talk later in the call about questions you can ask about what they've done so far. It's an important line to walk between giving them some suggestions or demonstrating your expertise and spending a lot of the call talking and making plans for them. When we're talking about establishing an authority and trust by showing that we understand what they need I just want to emphasize here that it's important to do little hints. If somebody mentions Instagram, for instance, we've talked before about the example of doing Instagram for people you might mention that yes, it's is certainly quite a pain that it can be only posted through the phone and that it has to be posted live at certain times. But, there are X, Y, and Z apps that allow you to set up the posts with the right tags and schedule it so that you only have to hit *go* at the right time. They probably won't know that. You're not making an entire plan for them on how to do their Instagram. You're giving a tiny tip that you are familiar with that would make their life easier. Showing them that you have some experience with this topic and doing it efficiently, and doing it well, and that you have a deeper level of knowledge on this topic than they do.

Similarly, for instance, if you're talking about doing a blog post for a prospect, you might mention that there's some great apps that are plugins for WordPress that allow you to schedule the post in an editorial calendar. They also give you additional levels of post status and you can mark something as pending review, or in progress. Things like that that you've found very useful in managing blogs that have multiple review levels. So that's the kind of idea, where you're just giving them a little idea, not necessarily to run off and do without you. But that shows that you understand the ecosystem which you are offering to take off their plate.

I promised that I would talk about how exactly we're going to tell them *why* we've called them, and *how* we found them and things like that. This is by using talking points. So, often, these are sales positions but I mean politicians use talking points a lot, don't know if any of you guys are politicians. But there's a lot of different areas in which talking points come up. But I want to point out some of the times that you might not have thought about using talking points. Or, they can take that fear that I was talking about of the unknown phone calls like this out of the equation.

The first time I ever encountered using talking points I think was my freshman year of college and I had a sort of sales job. I still to this day do not know why I wanted to do the sales job except that it was with a theater, and I used to do a lot of theater and it meant that I got free tickets and I got to borrow things for the costume shop and all sorts of stuff like this. So this sales job was one of those harder ones where you are calling people at home, on their land lines, over dinner and trying to sell them something. To me the way that I sort of set it up was that I was just calling people to ask if they had enjoyed the shows that they have done previously, and let them know about what shows they had coming up, and help them to get those tickets. This is before you could just easily go on the internet and buy your tickets and get the receipts and set up your whole season subscription to a theater. In that job, the sales manager gave us these papers with talking points and, to be honest, I personally didn't really use any of them as my job went on. But in the beginning I found them incredibly helpful for answering these key questions of why are you calling this person, and what can you do to help them.

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Before you have the fluidity with your subject matter (as in the services that you're offering, not just the subject matter of what you want to write about, but the subject matter of your services) it's important to give yourself some text that you've already written, that you've practiced, that you can say with ease when you're nervous on the phone.

Another time when I ran into using talking points seemed very different but this is an important way that I want you to remember to use your talking points. So I went to University in Italy and in Italy instead of written exams all of your exams are oral and specifically professors tend to flip open the textbook, to a random page, point to something and say "tell me about this". This is completely horrifying, and if you think about it like how could you possibly memorize every single page, every single thing, and every single one of the textbooks assigned to you for your course! It is, you know, a feat, and not one that most Italians do. So, Italians are known for this thing called (Italian word) which means… it's not translatable… but it is a little mischievous. They find ways to get things done. So the way that my Italian program director taught us to approach these exams was to pivot. Whatever they've asked you about, take a topic that you've prepared, that you know very well and find a way to pivot from the question that you've been asked into the talking points that you know well. And this is the kind of thing that you know we see politicians do all the time but you should use it on your sales calls.

If somebody ask you a question that you don't know, that is uncomfortable, that you don't have a good answer to about how they found you, or why you've reached out, or something like that, pivot to the answer that you've prepared. Some really (I'm used to them because I'm a journalist I do a lot of interviews) but really common and effective ways that I see a lot of PR people do this is to use filler sentences. There's one that's, "that is a really great question" and then move on to whatever it is that they want to talk about. Or, "I'm so glad you asked that, because…" and then move on to your talking points. So those are some ways, when somebody has asked something if you're not quite sure what to say, you can still rely on your talking points.

The other example of talking points that I just want to mention it, so when I used to work at MIT, the Massachusetts Institute of Technology, I ghost wrote for the president and the chairman and some other folks. And I think if you've never been a ghost writer at that level it's hard to imagine just how much of the words that come out of however people like that's mouths are scripted. And so the former President of the University was a woman, I think she was the first female president of the Technical University that we had, and these people have to have a lot of dinner parties with donors with other professors with visiting people who might get hired. But there were a lot of dinner parties and I remember our president had not been in such a high position at her previous University and so she wasn't used to talking points and I remember overhearing a conversation with some colleagues one day about how she was sucking at dinner parties. She was just totally uninteresting and it was because she wouldn't follow the talking points. And when she did she went into great conversation and people were really delighted to talk to her but when she didn't she was just floundering.

I bring this up not to say that if you don't use your talking points you're going to flounder on your calls, but rather, to show that your talking points help you map your phone call and make sure that you are covering the things that your prospect actually wants to hear. and needs to hear. Because, like I said, they really need to know, before you start talking about your services, why you are on this call with them. And so make sure that you have these talking points written down and practiced before you get on any of these phone calls because then you won't forget to cover the bases that your prospect needs to know and put them at ease so that you can bring the conversation to where you want it to go.

Why is that? We've talked about the talking points and how you can help them but those are the three, like I said, things to make sure that you have talking points about. Why you're on the call, how you found them, and how you can help. But you don't want to talk too much about your services right now. The point of those talking points, like I said, is to establish a level of trust and knowledge and liking with the prospect but not all of it it's just a stepping stone. So you should have effectively gone through your talking points in the first minute or two of the call. So say you have set up this call for fifteen minutes, or half an hour, or even an hour. What are you supposed to talk about the rest of the time? You aren't, because the more information that you give the prospect at this point the more opportunities you are giving them to create objections.

If you say, for instance, I just had somebody pick me some collaborations that they'd like to do with travel writing and they said a bunch of things and my initial reaction was when reading that email was that we can't do any of those things and I was so glad that we hadn't had a phone call about that. Because if she had mentioned all of these things to me on the phone I just would have said we're not set up to do that. We don't do affiliate sales or I can't do that with the database or something like that. But because it was an email and I got a chance to reflect on it and look at it later, I was able to think about how it might work and that's why I want you to save a lot of the stuff about specifically about how your services will be set up for your proposal. We'll get to that in a little bit.

What we really want to do on the phone call is to get the prospects talking. Get them talking as much as possible because, it's an annoying little bit of psychology but it really works, people create endorphins when they talk about themselves. I'm going to let that sink in for a second. It is a little annoying, but it's true, if you kind of think about it you'll kind of kind of realize it. Some people are shy about talking about themselves but primarily people create endorphins when talking about themselves. So you want to get the prospect not only talking about themselves—which is going to make them feel good and then make them feel good about you—but you want to get them talking about themselves in a way that will help you put together a proposal.

I put together 7 questions here that you should essentially have as little checklist next to you of things that you want to ask when you're on the call. Because each of these is really important in helping you put together your proposal. So you need to know what they've done in the past with their marketing or their content marketing of their social me whatever it is that you're pitching them you know what they've tried, and why it didn't work or what did work, or why they stopped doing it. Because you don't want to propose something to them that they stopped doing for a very legitimate reason that is not fixable.

It's very important before you give them any ideas about what you could do is to know what they've done, why they have done it, and why they stop doing it, if they have. Then you also want to know why they started doing it in the first place. Because the thing is that I often find this is a really crucial question. People tell you that they started a newsletter because they want to tell more new people about their trips. The obvious response I have is that, well, somebody has to sign up for your newsletter to find out about your trips, how are you actually reaching new people? The point of a newsletter is to tell people who already know about you what you have coming up.

Often, they started doing the exact thing that you're pitching about for the wrong reason. They actually have something else that they need to be doing that would be more effective that you can help them with. This question is really crucial and the only reason I don't have you ask it first is because sometimes if you ask these *why* questions people get a little stuck. Or they're not…they don't quite trust you enough to open up yet and they'll give you some cursory answers.

I like to start with a *what.* In law (like when you are doing trials as a lawyer) there's two different types of questioning times. When you're asking a witness who's on your own side a question you're asking these long questions where they often give you all sorts of information that's outside of the scope of your question. You're asking them to testify, as they say, you're asking them to tell their story. Whereas when you are cross-examining you are asking questions that have to stay very tightly to the scope of what came up in the initial testimony from the lawyer on the same side as the witness. There is a reason for this, witnesses are inherently combative to the lawyer from the other side. That's why the questions are kept very short and yes or no answers. The witness is asked not to testify, not to give any more information, to only give a yes or no. So you need to move your prospect out of being a combative witness who sees you as the lawyer for the other side into the lawyer for their side that they'll want to tell their story to. And so you do this by asking them very simple questions that are factual, that they can answer before you really dig into the storytelling style questions.

Once you've asked them why they started doing this in the first place, and made some notes about the reason, and if you think there's a better way that they can accomplish that goal. And again, don't mention it on this call yet. It's something that you will want to get to in your proposal or perhaps on the end of the call. You're going to ask them some deeper questions about how the marketing works and how they interact with their customers. Because these are the areas that really show you what you have to work with in terms of content, and also what content is working best for them now, and what content they probably should be providing more of.

First you want to ask them what kind of feedback they're getting from their customers about marketing. This is usually a place where they are going to toot their own horn. Or they're going to say, "Oh, we had this ad in this magazine and people really loved it". Or, "somebody saw my blog post and totally loved it". So, you're giving them an opportunity again to say positive things about themselves. They're not probably going to tell you that their customers said that their newsletter kind of sucked. Because their customers wouldn't tell them that, right? It's just not something that would be shared, their customers would just unsubscribe.

Then we are going to ask them what type of feedback they get from customers generally. Between these two questions you want to look for gaps. You want to look at the difference between amazing feedback that they get about the quality of their tours, and their high-touch service, and how they go the extra mile, and the fact that people aren't about their marketing. Because this is the kind of thing that you would use this language to say I know that your customers really value the incredible depth that you provide in your itineraries. But it sounds like they're not saying that on your blog posts, so I'd like to do that so that potential clients can see what you're going to be providing to them, if they choose to purchase a tour from you.

Okay so this is about consistency. So we asked these two questions to see where the company is not currently serving their prospects as well as they're serving their clients. That is where we come in. So the next question is a little deep, for some people, and if they're still combative they might not want to tell you. You might try to inject a little bit of *like* time in here where you talk to them, you know, about how it was for you to live in Africa, or whatever you can say to get them on the same page as you. Having somebody talk about how their internal processes work, especially for something delicate like sales, if their sales are what they want them to be, requires trust. Be sure that before you ask this question that you have a good level of trust. Otherwise you might just want to skip it, to be honest. I don't ask this question to everybody, it really depends on how the call is going, but it can provide some really valuable information. So if you get them to tell you how their sales process works, here is how you're able to work that into your proposal.

Once you know what the steps are in their sales process you can see beyond the content they were originally approaching them about. What are some additional pieces of content you can propose to provide that will help their sales process? Like we looked at in the previous two questions, be more cohesive with the type of experience they want to create for their customers. Again, if you don't have a good level of trust then just skip that question.

The next question on here, "what questions do customers typically ask?" is incredibly valuable. This is where you get the content ideas. Sometimes also the format ideas. So, for instance, if someone says that their customers are asking a lot of really basic questions about how the company tours work. Or how, if it's the website that gives you points for hotel bookings, you know, how it works at the person needs to change the reservation with the hotel or things like that. This is where you find out not just the holes in their sales process but the holes in the sales process that they completely are blind about. These are the things that they haven't realized that their customers need to know. That they aren't working on a solution for it, but the customers are showing that there's a need. So what I found with this question really is: Sometimes people can't figure it out just on the spot though, sometimes they need to think about it for a little while. If you ask them, and they can only come up with one or two then just make a note to expand upon this later with your on-boarding call, once you do get the gig.

Then the last one, this is really useful because we're going to do something I called Goldilocks model with our pricing. Goldilocks, of course, in this terms is that there's a low-end, a high-end, and then there's a middle, which is where they really want to live. But the high end you want to give them to show them what they could do. To show them what's the next step of working with you, what is the upgrade. Occasionally, people will just take you up on the high end right out of the gate. This is where you want them to really start dreaming. We talked last week about story-selling and how you want to create a picture for your prospect of what it will look like to work with you in terms of what they will get out of it: what they will achieve, that they've always wanted to see but they haven't done yet. So by asking them about what marketing project they've always envisioned, or dreamed of doing, and not had the time for, this is the opportunity for you to get some really meaty work that you wouldn't have known about otherwise. I've had people who I was going to approach them about their newsletter, but they had always wanted to have a blog. Or, I approached them about their blog and they always wanted to build an internal website for all of their past, and upcoming clients, to see videos and interviews. These are the projects that you would never know about by just checking someone out on the internet.

Throughout these questions, throughout everything that you say on your phone call, keep the mentality that you are interviewing them, not vice versa. If you feel like they're interviewing you switch it around. Use a talking point, segue into a question. Because, like I said, getting the prospects to talk about themselves serves two important purposes. It both gets them to like you, because they're creating endorphins which make them have a positive experience, so then they feel good about you as a result, but it also has really valuable information that you need to put together your proposal.

One of the ways that you can keep them from interviewing you is to use the ever powerful "*I see"*. When somebody says something that they've done in the past, or a big project they have coming up, it is a natural inclination to say "oh, that sounds great, or "oh, I'd love to work with you on that." Or, "what a cool idea" or "oh, that's an interesting question your customers have…" and you start testifying. The point here is that they are testifying, they are giving you the information. So rather than expand upon everything they tell you, any more than you need to establish liking and trust, you need to use "I see".

When they say something to you, you have to think like a detective almost, right? You're trying to get information from them to build your case. In this case, your case is the proposal about how you want to work with them. But you don't want to get narrowed into any one position. You don't want to not show bias you don't want to commit. You want to continue to get as much information as possible. There's a really interesting sort of psychological thing that you can do here. Whereas if you say, "Oh, that's great" people feel done. Okay, they feel like they've said something, you've liked it and they can move on. Or you'll ask another question, or something like that. When you keep it very narrow, unbiased, and noncommittal they feel the need to keep explaining. Secretly, they want to get approval about whatever they're saying. Like I said, it goes back to endorphins, people talk about themselves, and then they get approval, and then they feel good and move on.

Something that you can do here is to get them to give you even more information. Which is often information that you really need to have by not committing until you've really gotten to the heart of the matter. This is really useful for questions like, why did they start doing something in the first place? Or what questions they typically get from their customers? The questions that they aren't going to give a super deep answer to right out of the gate. When they say something and you say, "oh, I see" they feel like you are not quite satisfied with the answer, so maybe there is more that they needed to say. They haven't gotten a gold star yet and they'll keep going.

I recommend mixing "I see", the next question, and these small "oh, yes have you thought about doing these blah…blah…blah with Instagram? There's these apps that do it…" Things that build trust and you, in almost a rotation. Okay so that keeps you getting more information from them, also building trust, but really making sure that they're talking throughout.

The rules of thumb when you're on the phone call is, like I said, to make sure that they are doing the majority of the talking. I put 80% on here and it really varies how long your call is. I have a lot of calls and end up an hour because I just want to keep talking about things. If it is a very short 15-minute call then obviously you'll spend more time talking then if it was a longer call. Just think of 80% as a low end of how much they should be talking.

The second thing is not too quote any numbers. Don't give them too specific of an idea of how you could work together, because that can lead to them coming up with objections and things like that. But you also want to really clear about not giving any numbers. So the parting line on this, if they ask you how much a thing would cost, is "I'll have to look over it and think about it and I'll get back to you". You never want to give them a number on the phone. You always want to make sure that you were showing them that you don't want to give them a number because you were professional. Not because you don't know. This is why you always wanted couch any negative respond to this question with consideration. Telling them that you need to look over your notes. Telling them that you want to look at some different options that might be a fit for them. Things that make them think that you taking the time to come back to them with the number is beneficial for them, not a stalling technique. The thing is that it is both. It is going to be beneficial to them and is also a stalling technique. You don't want to give them a number by phone that won't comprise everything you might have to do for this project. It would be too low. Because it's not going to benefit them in the long term if you're doing something for a rate that you don't feel good about. Although it is a little bit of a stalling technique, it is beneficial for the prospect in the long run. Be sure to keep that win-win attitude in mind when you say that.

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Now, to get off the phone, just like with your prospecting email where you have a very simple ask at the end to just hop on the phone. I recommend a very very simple close, "I want to think about this and send you a collaboration proposal detailing a few options for how we can work together at difference price points. Would that be okay?" Then all they have to say is "sure!"

Some things that they might say, instead, are "I will have to talk to my business partner and see about that" or "Ummm, I'm not sure that I'm ready to move forward with this at this time". Or, "well it would depend on how much it was cause I'm not sure if we have the budget ". If you get any responses like that, if people can't say yes to you spending some time putting together a proposal this is where there are huge red flags that I talked about. If they won't even let you put together a proposal for them they are going to stammer and dig in their heels in all phases, not just in the sales process, but in actually setting up a process of working together. If you get a whiff of any of those things, if after having a great conversation with they've been talking and telling you their whole business story. You know all of their concerns and all of their dreams and they're still not sure, it's possible that you have not completely checked off all they know, like, trust boxes. It's more possible if they are just going to be a pita (which is a pain in the ass client) and I got this from someone who's a great freelance writing coach. You want to avoid PITA clients, like the plague. Because they will take up so much more time than good clients, they will negatively affect your energy about your work and in life and your relationship.

After all of this great time that you've spend together getting them to build up their endorphins, and talk about themselves, if they can't say *yes* to you asking a very simple question about whether you can send them a proposal, then you just say "great, thank you so much for your time and let me know if you change your mind in the future". Don't get attached to it, don't care, they're not good for you. If they can get over themselves and realize that they need to work with other skilled providers, who have ideas and concepts and backgrounds that they don't have right now, great. Right now, you don't care about them, they're a bad client. That is why we do qualification calls.

Assuming that they are not a bad client and they said, "Sure" let's look at how to build that proposal. Now when I do proposals I try to turn them around within 24 hours after the call. You don't want to send it too soon because it looks like you haven't worked too hard on it but you don't want to send it to long as you want to strike while the iron is hot, as they say. You want to capitalize on that goodwill you created while building the *like* portion of your call.

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I am going to tell you the seven sections that I include in my proposals and then we're going to look over a sample proposal that I have and the Six-Figure Travel Writing Road Map book. Then we have four different samples of content marketing proposals in the back, for different types of work. Once we've looked at those, again very quickly, I'm going to go back to the same side and talk, very specifically, about each of the things. Okay? Alright so I tried to cut and paste a PDF that I use but it is obviously letter instead of landscapes, it didn't go too well into PowerPoint. So I just cut and pasted the content, it's a little wonky here at the top, but you get the idea. I call these collaboration proposals rather than, I'm not sure what else you would use, just proposal or something like that. I want to emphasize the idea that work is involved from both parties. Even if you are "just writing blog posts for a client" they need to approve the ideas. They potentially need to be the one posting the blog, there's involvement from them and so I really try from the get-go to make it clear that this is a collaboration, that we are professionals that specialize in different things that we are working together.

In terms of who you should be addressing, with the address on here, this proposal to, it depends on what the company is, right. If it is sort of a one-person owned concierge travel booking company that's very easy, but if it's a larger entity you want to make sure (and I didn't talk with this before cause I don't think that any of you have your pitching big big companies at this point) but you want to make sure that the person you're talking to is a decision maker. If you had that great phone call with somebody from a large company at the end I would recommend that that last sentence not be just, "Hey, can I send you a proposal?" Rather be, "Hey, it was such a pleasure talking to you today and hearing some ways that we might be able to work together. If I where to put together a collaboration proposal would you be the person that could approve the budget for that, or is there someone else I would need to talk to?" Don't send a proposal unless you are sending it to somebody who can say *yes*. If you send a proposal, and it has to go up to somebody else, that proposal that you put together is based on the information you have provided, or that has been provided by someone else, it is not going to resonate with that decision maker.

The whole point of that long call that we had was to get the information you needed to show the prospect that you're going to make their content marketing dreams come true. If that person ends up not being the right person, not the one to give you the exact language that's going to resonate, you need to figure out who that is before you write the proposal. You can certainly take the content of that call and use it but you but you need to get the dreams, the struggles, the questions, the holdups, the roadblocks, of the person who's going to spend the money and put that in your proposal. Alright? So this "to" section it's going to be whoever you talk to, and make sure that it is the person who can spend the money. Otherwise, circle back and do the phone call again.

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Now, for the project section here, I always keep it very short, one line. We're going to say on the next page that the scope is much much longer than what you see here. The project section you are going to keep very brief. Sometimes you are going to be proposing multiple projects of multiple sections. I had a client who wanted to do this internal website for their past clients, their future clients, with interviews with the hotel and restaurant owners, and all sorts of other destination content. Also some things on their blog. In that case I would list two projects here. Now, the scope is the part that a) protects you, b) really shows that you're a professional, and c) keeps you from hating yourself six months down the line. This is really really important because if you haven't heard of the concept of scope creep this is when a client has asked you to do one thing, you've agreed on a rate, and then they just keep piling up for more and more things. This is something that can be really difficult to guard against if you're new, if you haven't done this type of work before. Which is why we put the four different collaboration proposals in the Six-Figure Travel Writing Road Map. So you could see the different types of things that you should include in your scope.

For this one, it's Work-for-hire for the blog. For the blog posts you want to be really clear on a couple things. I want to be clear on if the blog posts need to be approved before they are posted. Who was going to be doing the posting, who was going to be putting it into WordPress, was going to find the images. All these little additional things that can end up taking just to write the blog posts that you could forget to bill for. Additionally, on here I've mentioned that we will be deciding collaboratively on the ideas for the blog post. If this is something that you're going to be doing make sure that you mention that up front. Make sure you charge more for it, okay. Because just writing a blog post based on a topic assignment by a client is very different than doing research on key words and common questions to put together a schedule. You don't want to find down the line that a client starts asking you to do that and it has not been included in your proposal. Likewise, I highly suggest that you included it in your proposal because a lot of times when people have blogs that have been floundering it's because they really don't know what a blog post should be about. For the blog post that you're writing to be successful, and for them to be happy with the work that you're doing, it would be much better for you to be coming up with the ideas.

Some other things to put into the scope, like I said, are who will be finding the photos? Who will be posting the blog posts? How many rewrites are allowed? This is a big one okay, I have, for the travel magazine database, I have a pretty clear policy that I don't, as the editor, I'm not going to do more than one round of edits. That means that if you can't make something that's ready to go in one round of edits, then I can't use it. A lot of people who are not used to being writers think that they can just ask for it like two, three, four, six, seven, ten times. Until they like it. So as the writer, you need to protect yourself from that. You need to make it very clear how many rounds of edits are allowed, and what happens if they want to surpass that. And so I've said that if you go past a certain amount of edits it will trigger a fee billed in an hourly rate. That's one way to get around that. It's really important that whatever you choose to do here, like I said, it doesn't scare your prospect and also you want to keep this in line with what type of prospect you have.

Sometimes you have people you can see are a bit chatty, but they trust you. So in this case, you might want to give them up to three rewrites because you know that you might have to do that in the first couple but then they'll stop looking at it because they'll just trust you to run the blog for them. Well, I definitely recommend having something on rewrites in there—it's something that you need to feel out a little bit based on the prospect.

In this case, we have a different number of blog posts during a specific period which is the big marketing push for the company. This is not something that you're going to have in every proposal but it's something I would recommend considering because a lot of companies have a very specific time when they are doing more marketing versus times when they have their clients out on tours of the hotels, are very booked, and things like that. They are busy with other matters and they don't care as much about their marketing. This might be a way to get some additional income by doing more blog posts or social media posts during a certain time of year.

The next thing after scope. If you think about it, scope is kind of going to be like the work process. But the deliverables are the work products. This is where I outline, very specifically, what exactly the client is going to get. I don't just say six blog posts, eight blog posts, I say the word count, what they will cover, and I have given them all names. There is postcards, there is guide posts, service posts, so I really created a picture for the client when I talk about these deliverables about what they're going to get. So they can start to envision their blog populated with these different things. Something that I think that we often forget about when we're proposing to do a certain number of things for a client, on a weekly, or monthly basis, is that not every month has the same number of workdays. Every week does, but not every month. It's approximately 22 but it depends and so I make sure to have something in there to allow for those extra days that can happen in the month. This is just one of those things that shows the client that you thought about how this works, that you have experience, and that they can trust you to take these things over.

The terms—this is super important—never ever ever ever sign anything, for sure, if it doesn't specify when you're going to get paid. But also make sure that your clients have seen this before you choose to move forward. I found that I put in the terms you know that is on the 1st the 15th and they just keep trying to pay me on the 15th and totally forgot about the first. I'm like "no no we agreed on something in the beginning." Or is it in their head they think they're going to do bank transfers, which have horrible fees, especially if the money is going overseas. This is something that you want to have in there so that you can refer back to it. Never fill out a proposal without this, I know that it can be a little scary but it will really protect you later down the line.

The timeline, these are a little hard. I often find that I put them in the proposal and they don't end up working as we discussed in practice because people's schedules change, or they don't need to review everything, or something like that. I like to have a timeline in there because it shows the prospect that you have a process. That you have thought about how it's going to work, and that you are a professional.

Estimate fees. It's way way way far down and it's a whole paragraph but this is where we finally tell the prospect what we're going to charge them. The reason why I keep it in this section, a little hidden, after we painted this whole picture for them of what we're going to provide me is because that's not the point. The fee is not the point of the proposal. The point of the proposal is how you're going to work together and that's really what you want the client to be focusing on, the *how,* the *what.* Not just the money. We don't put it here to hide it or because it's not important but because we want to dissuade people from scrolling all the way down to the bottom of the proposal and looking at the number and saying no immediately. We want them to look at what you've included so that you can have a conversation about it. That's the thing about this proposal. It's not a be-all end-all, it's the beginning of a conversation.

The one that I've included here in the book doesn't have this, but if we go back to this deliverable section here typically when I send something out like this the deliverables will have three different sections. Which is this Goldilocks thing that I talked about. This one that I've included here has been taken from a later draft of a proposal of a particular client. But in the early drafts I had proposed to them it was only one post a week, three posts a week, and two posts a week then they came back to me and said we'd love to have more doing a prime marketing period. Can you put together something that encompasses that? We would like something between option B and option C. So this is what I came back to them with. Usually what I would have in here are three different options.

In this case it is just a blogging proposal. So the options would just be different numbers of posts, of different length of blog posts, or different types of blog posts. But if you are doing a proposal that includes different things, like if you were doing their newsletter, and their Twitter, and their blog, and their Facebook posts then you are going to have in here a pretty diverse menu. Where on the low end, on the baby bear end, you're going to have minimum number of things that you would be comfortable doing. So for instance, I don't recommend ever working with a client for blog post for less than one blog post per week because they're not going to see results. They are going to end up ending the collaboration. I would definitely say four blog posts a months is the least that you should quote anybody, but the sky's the limit. You can quote them two blog posts a day but you don't want to give them a proposal outside of a) what they'll pay for or b) what would work for the size of their business. Then you put together the deliverables and you put together the three Goldilocks options. This is where you go back to your notes and look at their dream marketing project that they gave to you, you look at what they have done in the past that has or hasn't worked, and you find a couple different options that are better than what they're doing now. That are the highest possible options that they might want to do someday, and then the middle, the mama bear option. The one that they are most likely to actually do right now.

The reason that we pick three is because, like I said ,if it's just something low on the totem pole you want to let them see what they can upgrade to. But it also creates a bit of psychological movement, you want them to look at the lower one, and the price, and say, "oh yeah I think we can afford this," but then look at all of the other things that they could get at a higher package. They may look at the price of the higher package and say "hmm, I don't think we would do the highest level package, but it does sound really great! Maybe we can do the middle one, for now". That's why we do this Goldilocks in the deliverables. To go back to where we were on the estimated fees, in this case, we have extra ones during the main marketing period, and then the normal amount. But otherwise you could say estimated fees for deliverable proposal one would be this much, proposal two would be this much, and proposal three would be this much.

When I create these different deliverable proposals I typically give them a name, and I make it a name that is evocative. For instance, I would say if we are doing blog posts and it's the difference between doing one blog post a week, two blog posts a week, or three blog posts a week. I might call the lower one Consistent Content Marketing. I might call the higher one Staying Top of Mind for Clients for Evocative Posts, and might call the middle one Sustained Content Marketing Case, or something like this. I want to give them all names because I don't want them to just be numbers. I don't want them to just for the client to be a number, whether it is price or blog posts. I want them to be an experience. I recommend that as you put together your deliverable buckets that we've seen here before you give each of them a name. When you talk to the client you are not saying the $500 package or the $2000 package, you are saying let's talk about how we can work on the Sustained Content Marketing package. It keeps there scary numbers from not appearing in the conversation so much.

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Like I said, there are seven things that you want to include in there. The people involved, making sure that you have the right one. The project, or projects if you are going to be doing more than one thing for them. The very specific detail on how you will work together on the scope and also what you will provide for them, preferable in a menu in the deliverables. A time-line detailing how the process will work, specifically for a typical month. The estimated fees that you would charge and the terms that they will pay you.

And with that I'm going to say thank you so much for joining us today. If you have any questions, send them to me at questions@dreamoftravelwriting.com. And I hope you guys have a great weekend.