

The background of the slide features a warm, orange-toned image of a hand holding a glass, with puzzle pieces visible in the background. The text is overlaid on this image.

# ***WEEK 5:*** **YOUR TEMPLATED PROPOSAL**

Save masses of time by pre-writing  
80% of the proposal.

Use this doc to close new leads on your  
Authoritative Offers.

## NOTES FOR OPTIMAL PROPOSALS

- Make a copy of your proposal template as soon as you book a 15-min / triage call.
- Systematize it so you can hand it off to AI or your VA to create the strong first draft.
- Questions you ask in calls become answers you write in your template.
- Give your Standardized Offer a name.
- Give your Retainer Offer a name.
- Pre-write and avoid changing key pages.
- Keep details to a minimum. The more you add about the work you'll do, the more there is to discuss, explain multiple times (with multiple people) and negotiate.
- Don't overdo branding / design - less is more.
- Add images, designed models / process diagrams and links / QR codes as needed.
- A proposal is a sales document, not administration. Always be copywriting.

# Let's get the work done.

## TITLE PAGE

- ☐ Fill in the "channel" area
- ☐ Add your name in the Prepared By line

## LETTER

- ☐ Add your signature
- ☐ Complete the contact information

## PROOF PAGE

- ☐ Add your primary KPI (as per Week 4)
- ☐ Add one testimonial
- ☐ Add a second testimonial
- ☐ Add a third testimonial
- ☐ If you have a video case study or large proof page, make a QR code and shortlink, and add both to this page

## The template



<https://copyhkr.com/tif-pt>

Where can my VA or team and I always find an updated list of testimonials? Add URL.

Where is my SOP for collecting testimonials and adding them to the above folder or sheet?

# Let's keep on keepin' on...

## STANDARDIZED OFFER (SO) PAGE

- ☐ Write the first draft of the multi-paragraph description of the SO
- ☐ Add part 1 of your process
- ☐ Add part 2 of your process
- ☐ Add part 3 of your process
- ☐ Add part 4 of your process, or delete it if there is no fourth part
- ☐ Give your SO a name, if you haven't yet:
- ☐ Complete the "The outcome" section, establishing the ROI for clients
- ☐ Write the first draft of your headline for this page
- ☐ Rewrite the description so it starts with a hook and uses a persuasive framework
- ☐ Optimize the description so it is more value packed
- ☐ Turn written numbers into numerals
- ☐ Rename the parts of your process so they are more enticing while staying clear
- ☐ Optimize the "The outcome" section so a CEO and CFO would love it

*Where can prospects and leads find more information about your SO? List all spaces.*

# Let's keep on keepin' on...

## RETAINER OFFER (RO) PAGE

- Write the first draft of the multi-paragraph description of the RO
- Update the parts of the process if they don't match those in the template
- Give your RO a name, if you haven't yet:
- Complete the "The value of" section, establishing the ROI for clients
- Write the first draft of your headline for this page
- Rewrite the description so it starts with a hook and uses a persuasive framework
- Optimize the description so it is more value packed
- Turn written numbers into numerals
- Optimize the "The value of" section so a CEO and CFO would love it

Where can prospects and leads find more information about your RO? List all spaces.

# Let's keep on keepin' on...

## ROI PAGE

- ☐ Write the first draft of your multi-paragraph POV (that is an insight on driving ROI)
- ☐ List results you've seen and others have seen, with a focus on what you've seen
- ☐ Draft the callout the CEO needs to read to instantly understand the ROI
- ☐ Calculate / Estimate what your optimization efforts have done for clients
- ☐ Highlight the parts of this page that you will need to customize to the lead
- ☐ Add a recurring task (for you or your VA) to update this page every time you have a win or optimization insight that supports your ROI argument
- ☐ Rewrite the callout to truly drive home the value, with impact

## TEAM / EXPERTISE PAGE

- ☐ Write your bio
- ☐ If you have a team member, add their bio and upgrade their title
- ☐ Fill in any gaps for team members with the description of the person you plan to hire next to fill that role and support your expertise
- ☐ Write the opening paragraph
- ☐ Rewrite the opening paragraph to lead with a stronger hook
- ☐ Revise the page to clearly and distinctly call out / highlight expertise
- ☐ Take 5 mins to make a wishlist of everything you will do in the next 6 months to make the not-yet-true and/or not-yet-glowing parts of this page come to life

# YOU'RE ALMOST DONE!!

## PRICING AND START DATE PAGE

- ☐ Update the SO name
- ☐ Copy-paste a short summary of the SO from the dedicated page
- ☐ Add the flat-rate price for the SO
- ☐ Update the RO name
- ☐ Copy-paste a short summary of the RO from the dedicated page
- ☐ Add the monthly recurring price for the SO
- ☐ Update the timeline with appropriate names

## SIGNATURE PAGE

- ☐ Write your name
- ☐ Write your title
- ☐ Write your company name

## DOCUMENT

- ☐ Change the page numbers, if necessary
- ☐ Change the titles of the pages in Canva (at the top of each sheet)
- ☐ Brand it to make it yours
- ☐ Save it as a template in Canva, and add it to a folder if necessary