

How to Find Clients as a Freelancer

End your worries around finding new clients and build a marketing strategy that will generate leads without getting in the way of your paid projects.

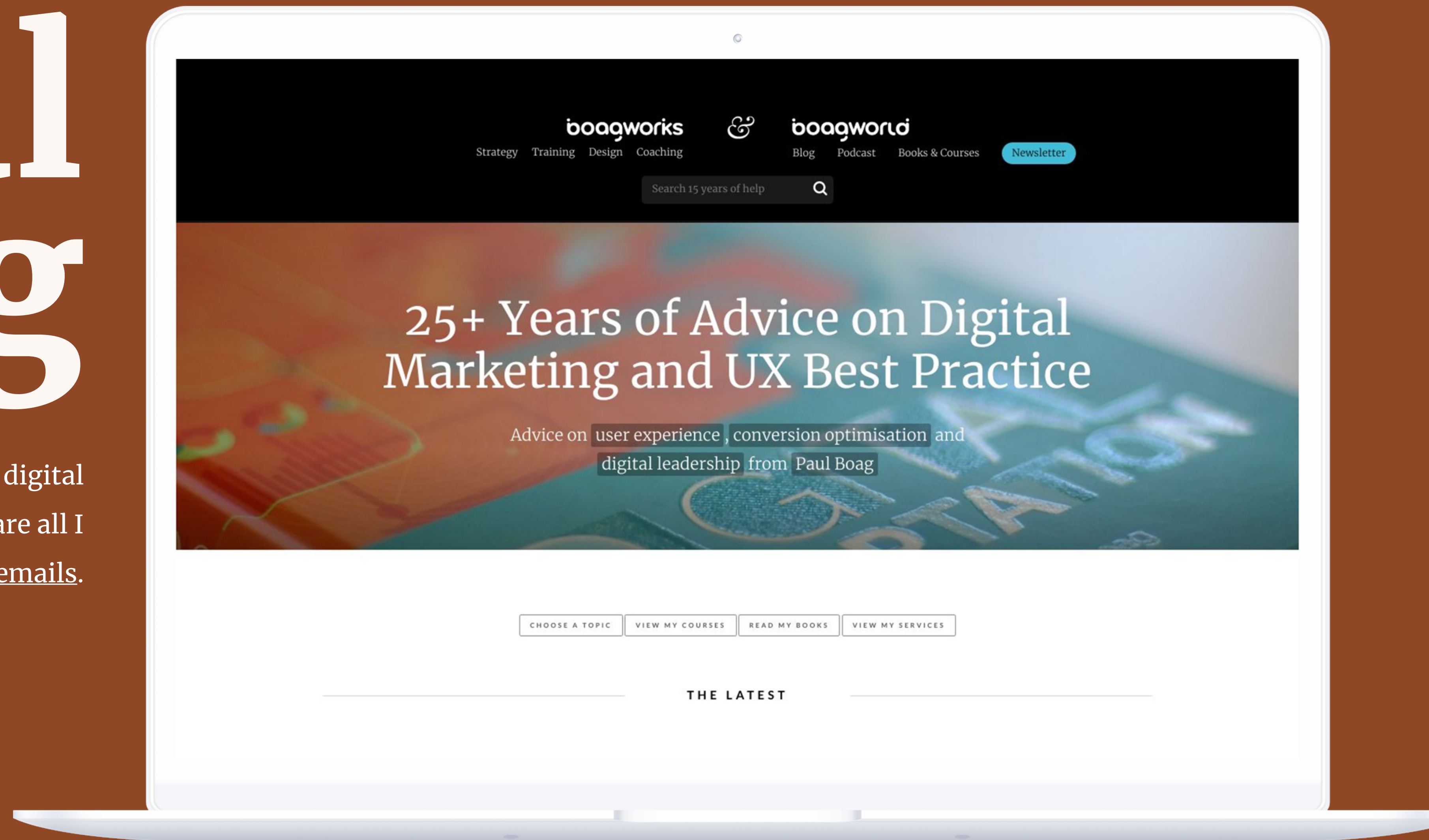
Paul Boag

I have been working in digital for over 27 years, 13 of which involved running an agency and 6 as an independent consultant.

I have worked with clients in every conceivable sector and both multi-nationals as well as small startups.

Paul Boag

I have written 6 books on various digital topics, speak internationally and share all I know through [my blog](#) and [emails](#).



Why You Are Struggling to Find Clients

Most agencies or freelancers are solely reliant on word-of-mouth recommendations. This section will look at why this is a problem and why many of the alternatives aren't much better.

What you really want from your marketing

More

Most agencies and freelancers have quiet times when the phone doesn't ring.

Therefore, they need a method for generating more leads at these times.

Better

Many also find themselves stuck working for the same type of client, often at the lower end of the market. They want better clients but cannot find them.

Easier

Vast amounts of time and energy can go into pitching for work. That undermines profits and can be demoralizing. Agencies and freelancers need clients that want to work specifically with them.

4 common mistakes made by agencies and freelancers.

- Relying too heavily on word of mouth.
- Wasting money on advertising.
- Getting work through online marketplaces.
- Approaching content marketing in the wrong way.

Relying too heavily on word of mouth

It is passive

Word of mouth relies on clients recommending you. There is nothing you can do but ask clients for recommendations. Therefore, you cannot proactively generate business.

It is limiting

Word of mouth typically happens within sectors and companies of a similar size. That means it is not a good way to break into new sectors or gain bigger clients.

It is risky

Word of mouth is common within different groups of a large organization. However, that means you can quickly rely on one or two large clients whose departure would be devastating.

Online ads and marketplaces like Upwork tend to attract smaller businesses who primarily choose based on price.

Even procurement platforms with larger projects are rarely worth your time. Often they already have a preferred supplier and post because they are required to.

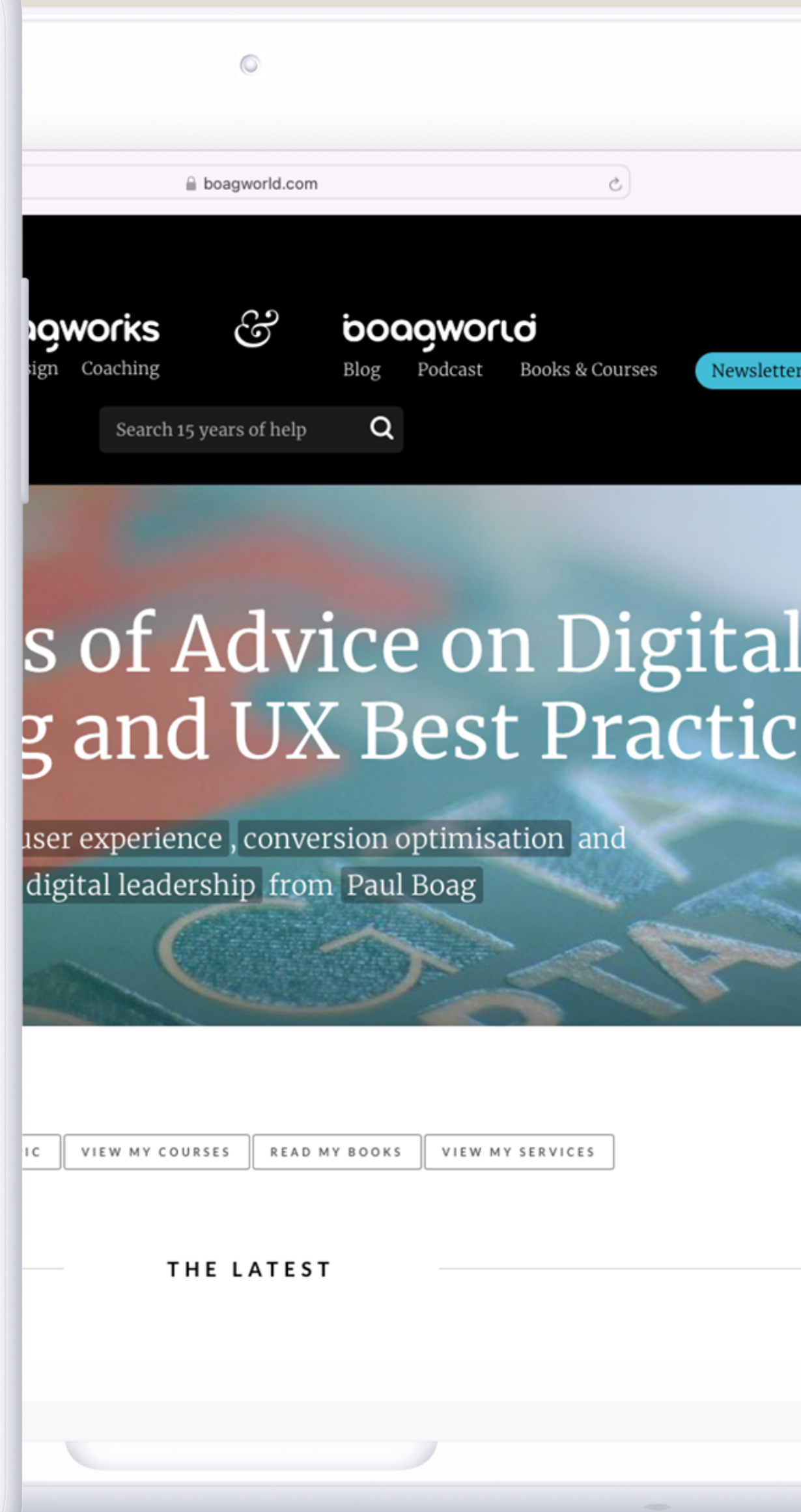
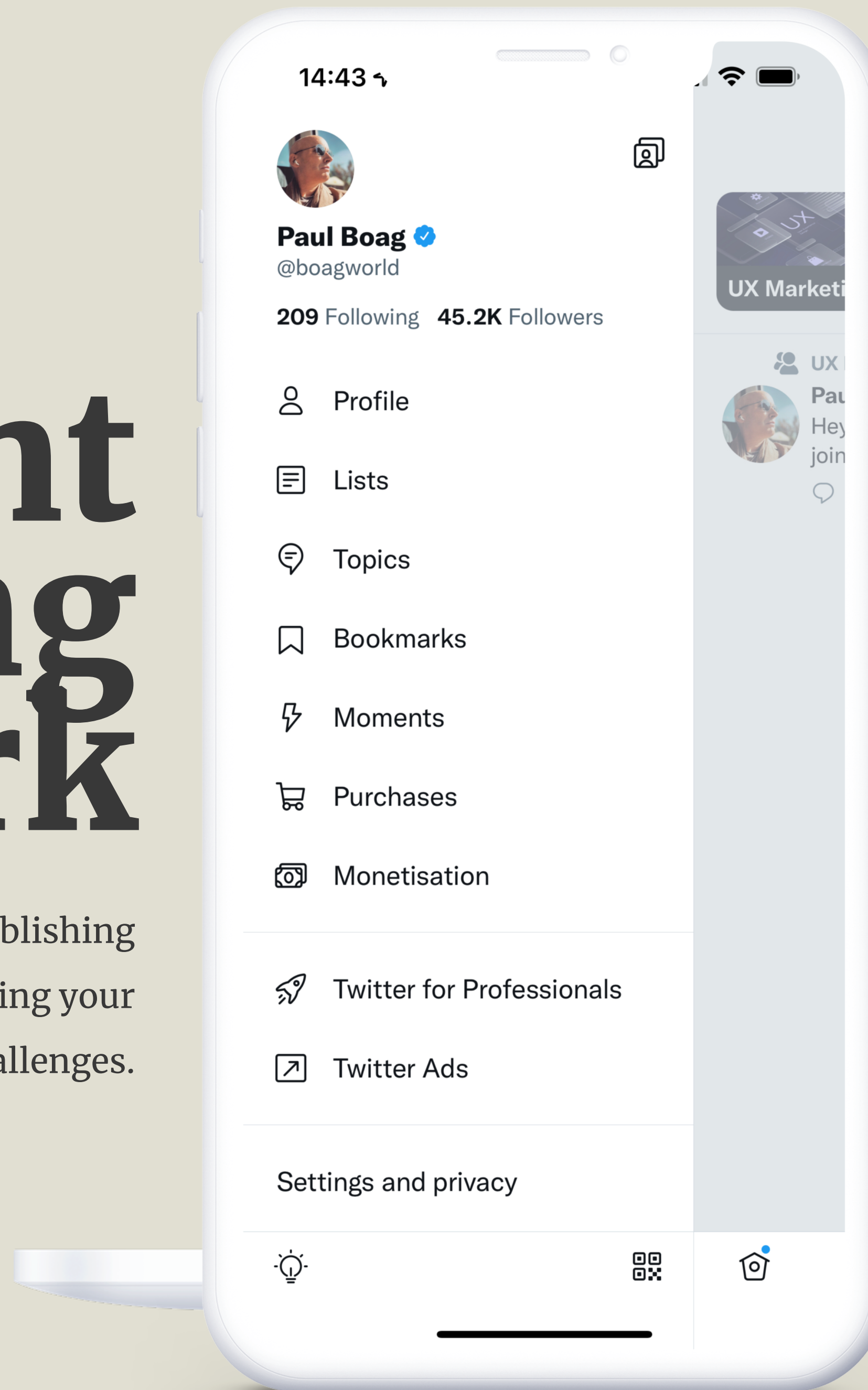
There is no relationship. You are just another supplier.

Wasting money on online ads or using marketplaces

We want clients to approach you, because they want to work specifically with you.

Content marketing can work

Content marketing is great for establishing your credibility and for increasing your reach. But, it has its challenges.



Content marketing challenges

Too much noise

Because content marketing works, everybody is doing it. It is hard to get people's attention with so much noise online.

Gone and forgotten

Even if somebody sees your content, it will quickly move on and be unlikely to remember you when they are looking for services you supply.

Lacking time

Producing content is incredibly time-consuming. Time that you could be spending doing client work.

Email offers the answer

B2B lives in email

Social media and blogs are fine, but our prospective clients live in email. Email is the primary means of communication for almost all businesses.

You will be seen

People may not read every email they receive, but they will see it. That cannot be said for other channels. Seeing your name is enough to remind them you exist.

You will be read

I have over 8500 subscribers currently and a 38% open rate. That means every two weeks 3,230 potential clients read about my expertise.

**Get people to
subscribe with a
sales funnel**

What is a sales funnel

A sales funnel is a journey you take a prospective client on from first hearing about you to the moment they sign up for your services. In many ways, it reflects a customer journey map, but with more emphasis on how you move the customer towards hiring you.

What is a sales funnel

Attract attention

Build a connection

Keep engaging

Encourage contact

Close a sale

Disclaimer

This is not a quick fix

When clients first enter your sales funnel, they may not intend to buy your services. It, therefore, may take years to get them to the point of purchase.

Why you want a sales funnel

Targeted

We can target a particular group of clients we would like to work with with a sales funnel.

Consistent

Once your sales funnel has been running for a while, it will provide a relatively consistent and reliable source of new clients.

Controllable

By tweaking your sales funnel and the messaging, you can control the type of client and work you win.

1. Attract attention

We will **identify and make contact** with our audience. However, we will not sell as they are not ready to buy.

Instead, we will **approach them for research purposes**. This is a non-threatening way to get on their radar.

We will introduce a **course or report** we are creating and ask for their feedback on it. This establishes credibility.

We can also build awareness of our lead magnet through guest blogging, speaking, social media and more.

2. Build a connection

When the report or course is complete, we will approach them again, making it available for free.

When they access the course, we will ask them to sign up for a mailing list offering advice and best practice.

3. Keep them engaged

Once on the mailing list, we will keep them engaged by providing regular and valuable content.

That ensures that they remember you when they need your services.

4. Encourage contact

We use the mailings to encourage your subscribers to make personal contact with you and reach out to you if they need advice and support.

That will lead to them emailing you if they are doing any work in your area.

Sales Funnel Recap


- ✓ **Grab your prospects attention.**
- ✓ **Gain their permission to contact them regularly.**
- ✓ **Demonstrate value and expertise.**
- ✓ **Keep in contact until they are ready to purchase.**

Questions

The process I have outlined here is the bedrock of a successfully finding clients. If you have questions about how it works email paul@boagworld.com

Define the Market You Wish to Target

The internet is noisy, and your marketing will be lost unless targeted at a specific audience. In this section, we will explore how to do precisely that.



**Why you need to
segment your
market.**

Why it important to specialize

Less competition

The more specialized you are, the fewer others can offer what you offer. That means less competition and less pitching for work.

Seen as an expert

By specializing, you are seen as an expert in your particular field. You become the 'go to' person for that kind of work.

Higher fees

Because fewer people can do what you do to the same standard, you can demand higher fees.

Specializing does not mean...

Turning away work

We are just focusing our marketing efforts. So we may primarily talk about our specialism, but that doesn't mean we would turn away other types of work.

You will lack enough work

If you stop focusing on your locality (a type of specialism in itself) and think globally, more than enough work will be available.

The work will get boring

A specialism does not need to last forever. You can run different campaigns focusing on different areas.

Specializing does mean...

Tailoring our message

Because we are focusing on a specific audience, we can tailor the messaging to better resonate with them.

Being heard more often

Because you are consistently targeting the same group of people, they will hear from you more often and come to know your name.

Becoming the go-to person

Because you will demonstrate an understanding of your audience's challenges, you will become seen as the go-to person for that sector.

Take it slow

Jumping into a specialism can be risky until you know it works. Take it slow.

Do not redesign your website to focus exclusively on your specialism. If you do, you will lose work outside of that area.

Instead, **create a separate campaign with a landing page** aimed at the audience you are trying to reach.

**Stop redesigning
your website every
5 minutes.
It will not help.**

Your failure to win new work is not because of your website. It is because you are not targeting the right audience and providing them with value regularly.

How to find your minimum viable audience

Boost Your Voice

Do they talk to one another?

Some sectors are very protective of their intellectual property, so there is little communication between companies. Others are very open. You want the latter.

Can they afford you?

Before worrying about anything else, you need to establish whether they can afford your services or are the size of client you wish to target.

Is there community?

Does the sector have dedicated blogs, conferences, and online communities? These are excellent forums for you to reach members of your target audience.

Do they move around?

How long do people stay in a company? If they regularly move on within the same sector, your reputation will move on with them.

Are there influencers?

Are there figures within the community who are already well known and respected? Do they seem approachable and friendly?

**Don't be
afraid to go
really niche**

Have more than one sector

Remember, you are not limited to a single sector. Once you have exhausted the potential with one group, move on to another.

Minimum criteria

It is viable as long as a sector has a handful of publications, events, or communities and approximately a thousand potential companies.

Consider your own experience

Look at your portfolio of clients and previous career experience. Are there any reoccurring sectors, or do you have good contacts in a particular sector?

However, don't be constrained by your experience. It is more important that it is a sector that excites you and has the proper criteria.

3 sectors I targeted

UK Charities

UK Heritage

UK Universities

**Research your
sectors and pick a
winner.**

Warning!

This is the most boring part

Researching a sector does take a little time and will make you feel like this whole approach is too much effort. However, I would encourage you to persevere. The right sector can keep you in business for years.

Create two lists

Influencers

This list includes individuals, events, blogs, communities and membership organizations.

Clients

This is a list of prospective clients you would like to work with within this sector.

What we want to know about sectors you are considering

What conferences do they have?

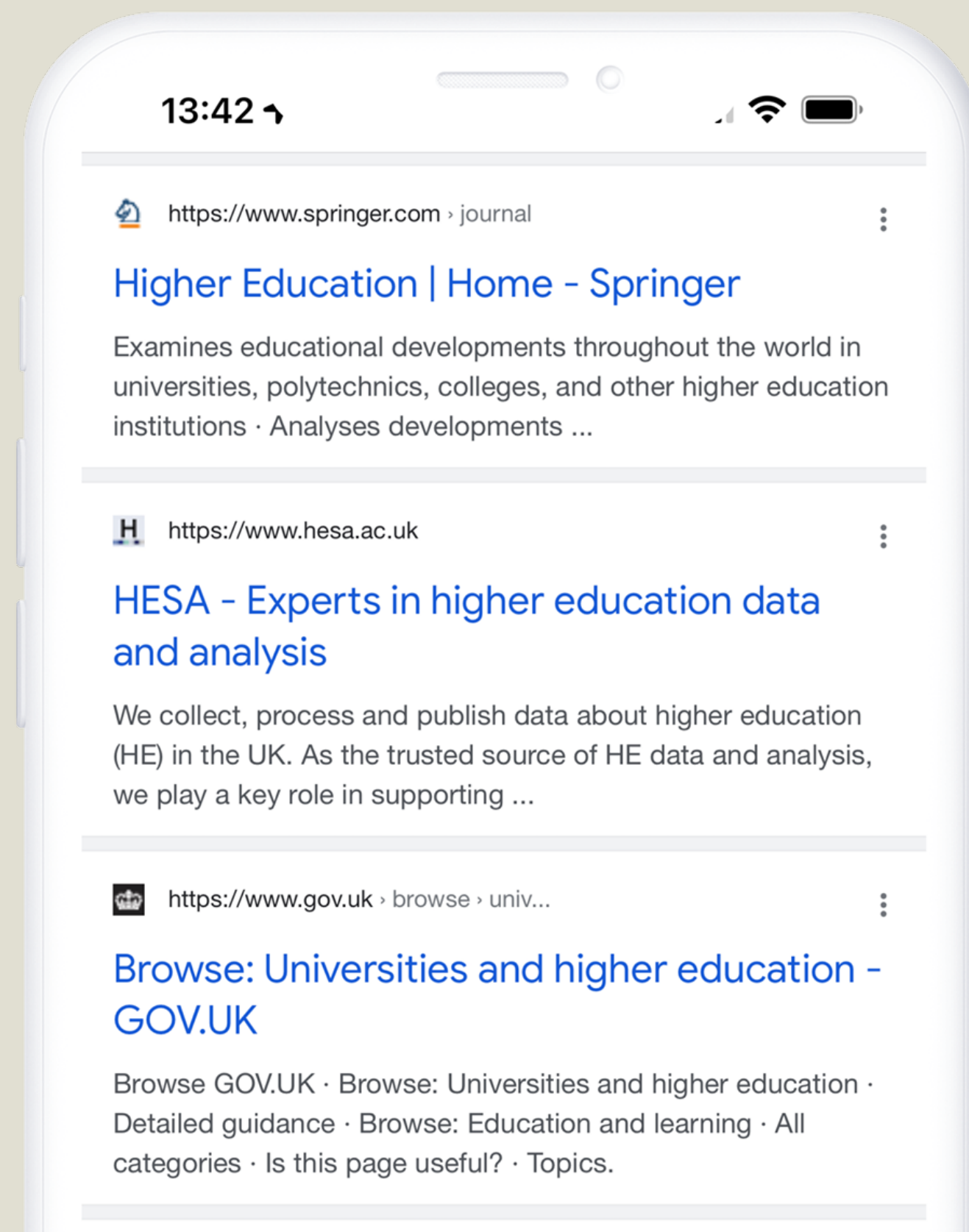
Do they have smaller scale meetups?

Do they have on or offline publications?

Are there mailing lists or forums?

Can you find any influencers?

Finding the key players



Talk to your contacts

If you have existing clients in the sector, talk to them. Ask what publications they read, events they attend, and communities they participate in.

Turn to search

Use Google to search for your sector combined with words like conference, meetup, members organizations or blog. Also, pay attention to who is advertising on your sector keywords.

Finding the key players

Use Social

Search LinkedIn and Twitter for your sector and look for influencers, companies, member organizations, and other groups in the sector.

The screenshot shows a LinkedIn search results page for 'Higher Education'. The page is divided into three main sections: People, Groups, and Jobs. The 'People' section lists three profiles: Farhan Rohila (Chief Executive Officer at Higher Education Consor...), Joanne Patterson (Head of Marketing & Comms, Higher Education ...), and Laura Pacey (Product Director, UK Higher Education and Open...). The 'Groups' section lists three groups: UK Higher Education Marketing (2.6K members), UK & Ireland Higher Education Institutional Research Network (293 members), and Alteryx UK Higher Education User Group (82 members). The 'Jobs' section shows a job listing for 'Education Leadership Executive - UK' at Apple in London, England, United Kingdom. The page also features a navigation bar at the top with icons for Search, Home, My Network, Jobs, Messaging, Notifications, Me, Work, and Advertise. A search bar is visible at the top left. A 'People' filter is selected in the top navigation bar. A 'Restart Trial' button is visible in the top right corner. A 'Messaging' button is visible in the bottom right corner.

Identify a list of about 30-50 specification organizations you want to work with.

Start with companies you know and like.

Add recommendations from personal contacts.

Add connections on LinkedIn.

Turn to Google search for the rest.

**Identify
some
prospective
clients**

Identifying your initial contact points.

Now you have your two lists the next stage is to identify the specific people we want to contact at these organizations.

Make an educated guess about the role

Ideally we want to contact a specific person in each company, rather than using their generic contact address.

To do that, we need to identify the role of the person we want to contact.

That role will depend on the organization's size, structure and sector. It will also depend on the services you provide.

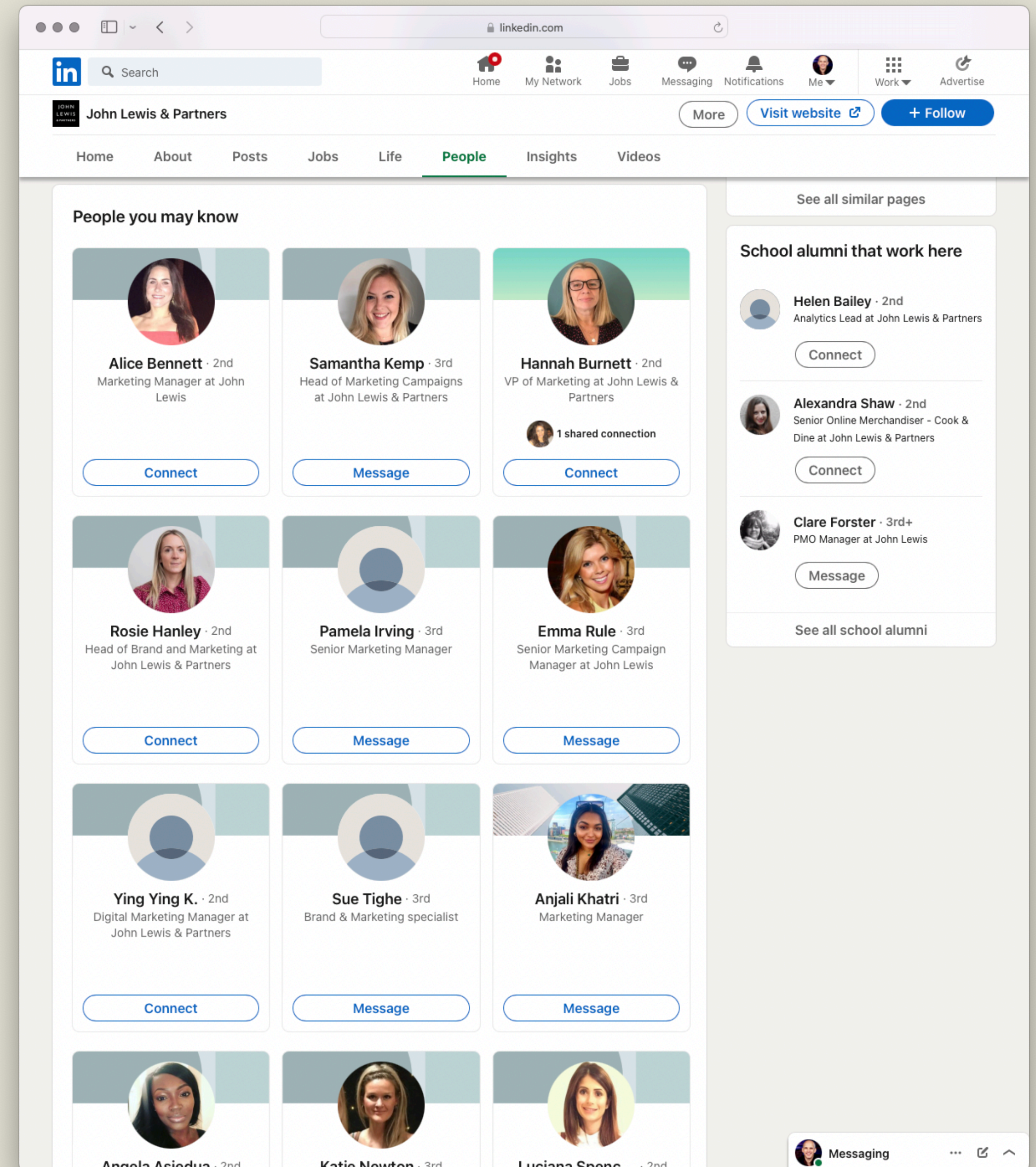
- Small companies, go for the founder.
- Single product companies, aim for the digital lead or head of marketing/IT.
- Multi-product companies will get complicated.

Find the right name

Once you know the role of the person you want to contact, you can view the company page on LinkedIn and search for that role.

Alternatively you can search on the company website or via Google.

- Head of [marketing]
- Director of [marketing]
- [marketing] lead
- [marketing] manager



Can't find a name?

Reach out to somebody else in the same company and ask.

Failing that try emailing the catch all email address.

Alternatively, give up and try another role or company.

Find their email address

Although increasingly I just use LinkedIn

You can guess at an email address by looking at the emails of other people in the company. You can then validate that email online.

To save time, consider using an email lookup service like Find That Lead.

The screenshot shows the Email Hippo website interface. At the top, there's a navigation bar with the logo, 'FREE APPS', a search bar, and a 'GO TO EMAILHIPPO.COM' button. Below the navigation, a green banner reads 'Professional email verification and data enrichment since 2009'. The main content area is divided into sections: 'Welcome to the home of our free apps site.' with a sub-header 'Email address verification technology from Email Hippo that connects to mailboxes and checks whether an email address exists.'; a 'Verify Email Address In Real-Time' form with an input field 'email to verify' and a 'GO' button; a 'Related Tools' sidebar with 'Disposable Email Address Checker', 'Domain Age Checker', and 'WHOIS'; and an 'Articles' section with a featured article 'Detailed Guide On How To Do Mailbox Pinging'. A social media share prompt is visible below the form, and a cookie consent notice is at the bottom.

The screenshot shows the Find That Lead website. The top navigation includes the logo, 'Tools', 'Pricing', 'Blog', 'Team', 'Resources', 'English', 'Start for free', and 'Sign in'. The main headline is 'The Smartest B2B Sales Prospecting Tool for your Business' with a sub-headline 'Try it now and reach thousands of customers every month'. A search bar contains 'Your work email' and a 'Get started' button. A 'My leads' panel on the right displays a list of leads with filters for Location (Brazil), Job title (CEO, Marketing Manager), Industry (Marketing, Freelance), and Company size (501-200, 10,000+). Below the main content, a section titled 'FindThatLead is trusted by amazing companies' features logos for Google, wework, amazon, verizon, Alibaba, hp, @askdrive, Gympass, cabify, Adecco, salesforce, SAP, criteo., ALESEC, Deloitte., Zappos, SBC, marfeel, and Gartner. A final statement at the bottom reads 'We are the lead generation tool with the highest return on the market'. A 'Need help?' chat bubble is in the bottom right corner.

Defining your audience checklist

- ✓ **Research sectors where there is a culture of sharing and interaction.**
- ✓ **Create a list of companies you would like to work for and influencers in the sector.**
- ✓ **Identify the role within each organization you should be contacting.**
- ✓ **Find the name of the person in that role.**
- ✓ **Find their email address or linkedIn profile.**

Questions

In many ways this is both the most boring
and time consuming part of the process so if
you have questions about how it works email

paul@boagworld.com

Get the attention of your audience

Once you have chosen your audience, you need to get their attention. This section will show you how to maximize the limited time you have to do just that.

**How to plan an
effective attention
strategy.**

We will not be selling!

People can smell spam
a mile away

You will not contact
them at the right time

However, we will...

Ask for their help.

Spam wants you to buy something or do something. Spam does not seek your opinion or want to hear from you. Instead, we will ask people to share their experiences and wisdom. That makes people feel valued and listened to.

Provide value in return.

In return for them sharing their experiences we are going to provide them with insights into their sector and job, a lightweight review of their website and ongoing advice and support.

The deliverables

A report

In return for signing up for our emails, we will provide an industry report that gives them insights into how their sector is using digital.

A short site review

We will also offer a short first-impressions review in return for their participation in providing information that will go into the report.

Regular emails

We will provide ongoing value and keep people engaged by sending them regular advice via email that helps them overcome the challenges they face in their role.

How we will engage with our audience

Introductions

Although we won't expect a reply, we will introduce ourselves and explain we are researching the sector. Then, we will ask them what they would like to know about their sector and its use of digital.

Survey

Later we will follow up with a survey that we will explain will inform our report. We will offer them the report for free as well as a site review if they complete the survey.

Report

Finally, we will let them know when the report is available. They can download the survey from a landing page where they will also sign up for an email series covering the report in more detail.

What should your report focus on?

- Where does your expertise lie?
- What kind of work do you want to win?
- What problems do you want to draw attention to?

For example, I am a UX consultant, and I enjoy conversion optimization work and yet am frustrated that most organizations launch their websites and abandon them.

My report, therefore, might focus on the fact that a website needs to evolve post-launch.

Does it need to be a report?

The only advantage a report provides is that it contains written content that can be reused and built upon as you will see later.

No, it could equally be an app, tool, code library, Wordpress template as long as it is free.

Making initial contact

Do everything you can to prevent it looking like a marketing email. Send it from your personal email address, keep it plain text and avoid any links.



Can I ask for your advice?

To: [Lucy Hardy](#), Cc: Bcc:

From: [Paul Boag \(paul@boagworld.com\)](mailto:paul@boagworld.com)

Subject: Can I ask for your advice?

B I U San Francisco | 14 | **A** | | | | | | |

Hello Lucy.
Sorry for emailing out of the blue, but it was suggested that you might be an ideal person to contact.

My name is Paul Boag, and I run a user experience consultancy called Boagworks, who specializes in charity fundraising.

The reason I am writing is that, alongside experts in the field such as yourself, **I am preparing a report on the state of digital fundraising.**

However, before I undertake formal research, I want to ensure that the scope of the report is relevant and provides maximum value.

I would appreciate any insights you may have into what areas of research would prove particularly useful. For example, I was considering focusing on the level of user research and testing being done in the sector. Would this be relevant? Are there other areas I should be looking at?

I appreciate that you are busy and don't know me. However, even a line or two pointing me in relevant directions would be hugely beneficial.

Thanks for your time and consideration.

Thanks.
Paul

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Send

The subject makes it clear that you are not selling something and that this is not a typical spam email.



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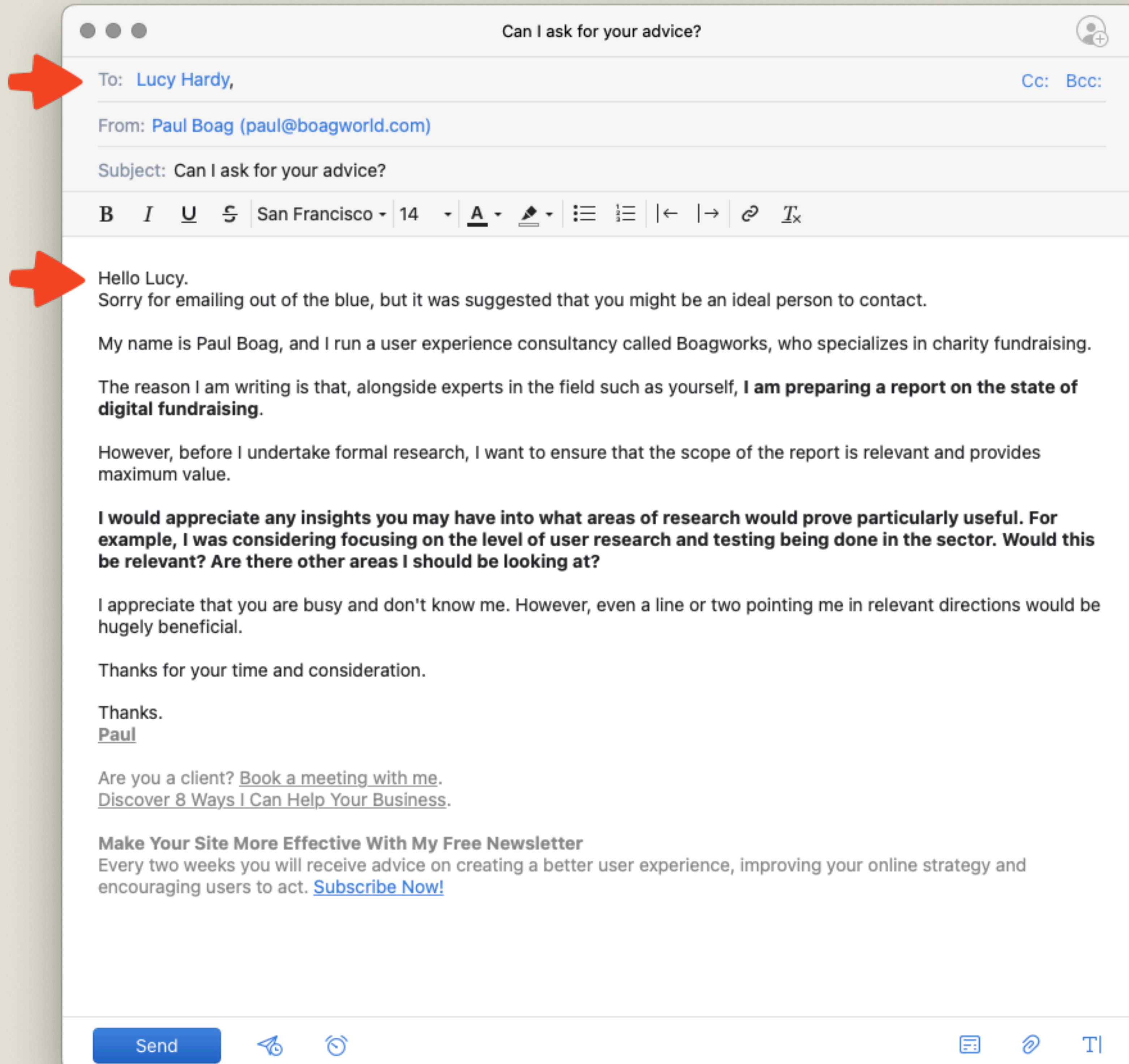
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Ensure that the email is personalized as much as possible.



Acknowledge that the email is unsolicited. Make people feel appreciated by suggesting they were recommended. If you can name a mutual contact that really helps.



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Keep your introduction sort, but relevant to your audience (charity fundraising).



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Flatter them by calling them an expert and imply they will be associated with other experts. Finally, make it clear why you are emailing.



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Highlight what you are specifically asking.
Then, give them some examples to provide
them with something to respond to.



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Show you value their time and only ask for one or two lines response.



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Thanks for your time and consideration.

Thanks.
Paul

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Send

Show you value their time and only ask for one or two lines response.



Can I ask for your advice?

To: [Lucy Hardy](#), Cc: Bcc:

From: [Paul Boag \(paul@boagworld.com\)](#)

Subject: Can I ask for your advice?

B I U San Francisco 14 **A** | | | | | |

Hello Lucy.
Sorry for emailing out of the blue, but it was suggested that you might be an ideal person to contact.

My name is Paul Boag, and I run a user experience consultancy called Boagworks, who specializes in charity fundraising.

The reason I am writing is that, alongside experts in the field such as yourself, **I am preparing a report on the state of digital fundraising.**

However, before I undertake formal research, I want to ensure that the scope of the report is relevant and provides maximum value.

I would appreciate any insights you may have into what areas of research would prove particularly useful. For example, I was considering focusing on the level of user research and testing being done in the sector. Would this be relevant? Are there other areas I should be looking at?

I appreciate that you are busy and don't know me. However, even a line or two pointing me in relevant directions would be hugely beneficial.

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Send

You may not get any replies at all!

At this stage it is not about replies, it is about introducing yourself. However, if you do get replies, make sure you respond by thanking people.

Reference their comments so they know it is not an automated thank you.

Refining your reports scope

If you receive feedback, make sure you use that to shape the focus of your report.

Keep the report as focused as possible but still broad enough for you to be able to write at least 2500 words. It has to feel like more than a blog post.

Try to pick a topic that you will be able to support with numbers. For example, 22% of respondents have never done usability testing on their websites.

Preparing Your Sector Survey

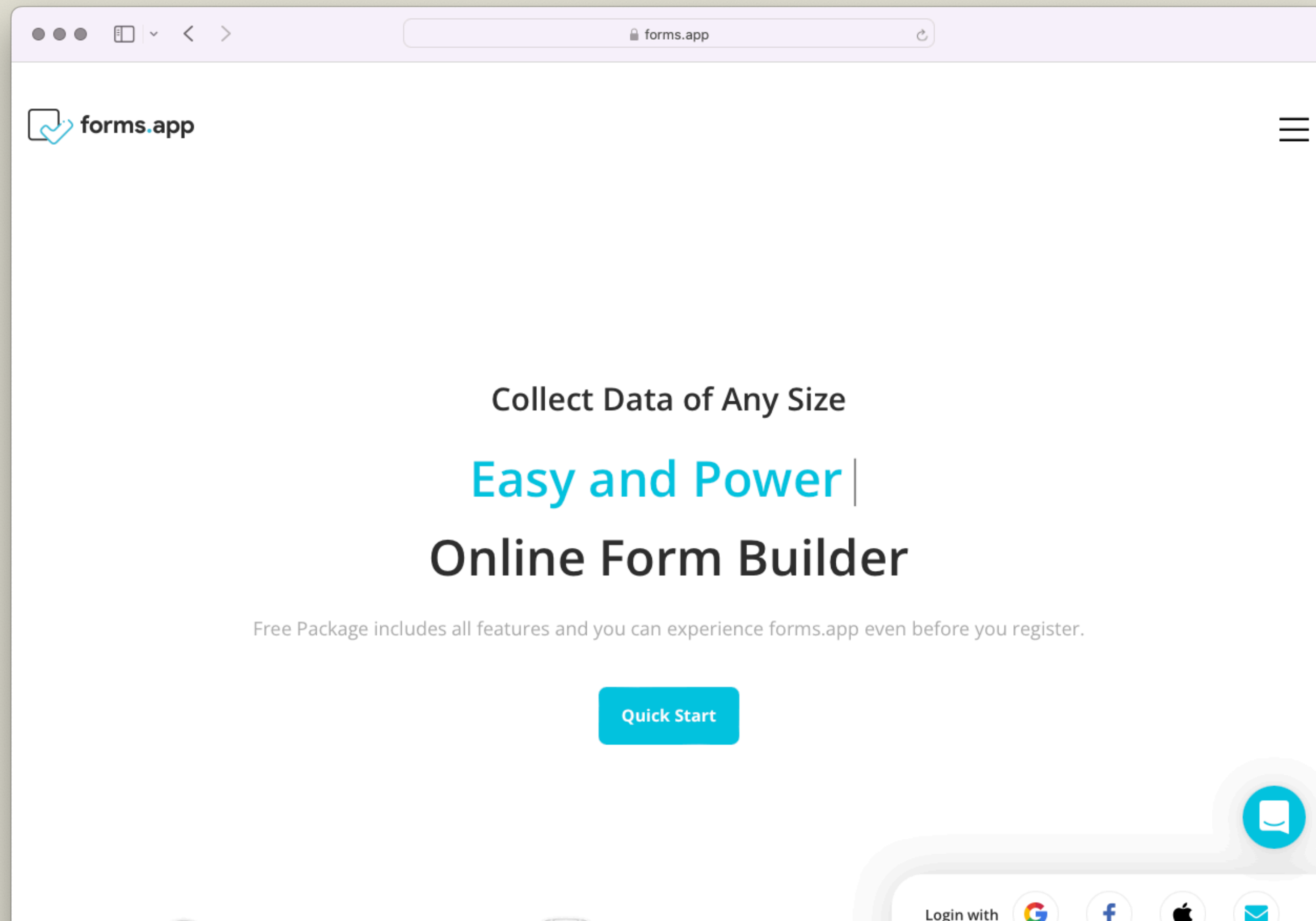
Why send a survey?

Content for the report.

An opportunity to make contact again.

To understand your audience.

Tips for creating your survey



Keep it short. Approximately 5-7 minutes to complete and about 20 questions.

Use mainly multi-choice questions for easier data analysis.

Start with the easier questions.

Ask if people would be willing to be interviewed at the end.

Offer a site review at the end.

Use a platform like [Forms.app](https://forms.app) that is easily embedded and customized.

What to ask?

Questions about information your audience is interested in. For example, "who does your web team report to?"

Questions that address your audience's pain points. For example, "do you have a dedicated budget?"

Questions about the company's makeup to allow segmentation of results around things like size.

Questions related to your area of expertise or the services you offer.

**Creating your survey
landing page.**

What to cover

The offering

Start with a clear explanation of what they will get if they complete the survey. Something like: "for 5 minutes of your time, you can get insider insights into charity fundraising."

The scope

Provide an overview of what you think the final report will cover, but make it clear that it will be shaped by the feedback you get from the survey.

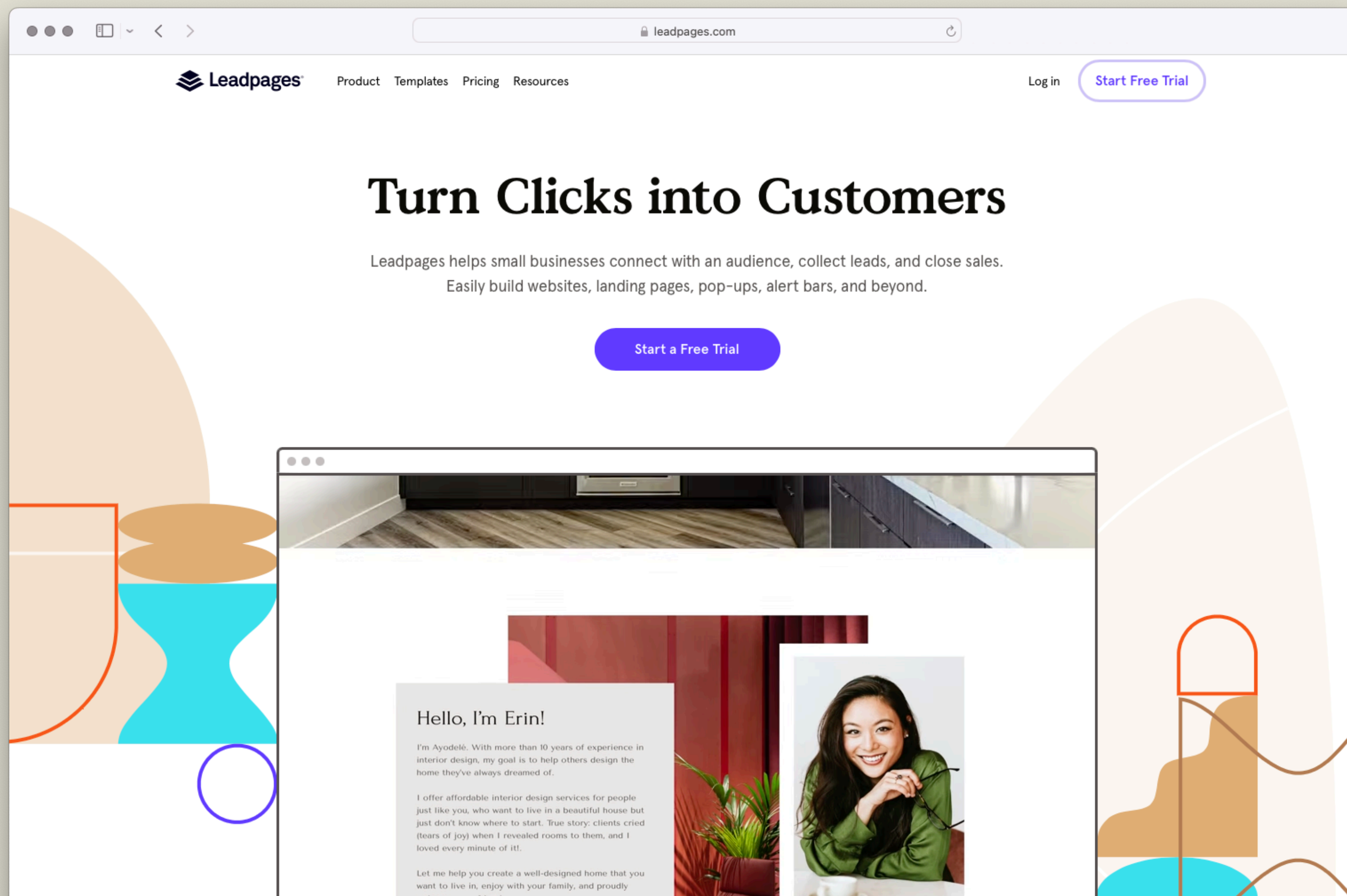
The benefit

Focus on the benefits that the final report will provide. Benefits could include an awareness of the competitive landscape, evidence to support your requests to management, and insights into areas of innovation.

Why you

Say a little bit about why your company is undertaking this research. Also, include your experience in the sector, if you have any.

Designing your landing page



If you are a designer this page will be a showcase of what you can do.

If not, feel free to use a tool like leadpages.net.

Break the page into small content blocks made up of a heading and one or two sentences.

Use lists and icons where possible.

Do not repeat yourself.

Have an obvious call to action.

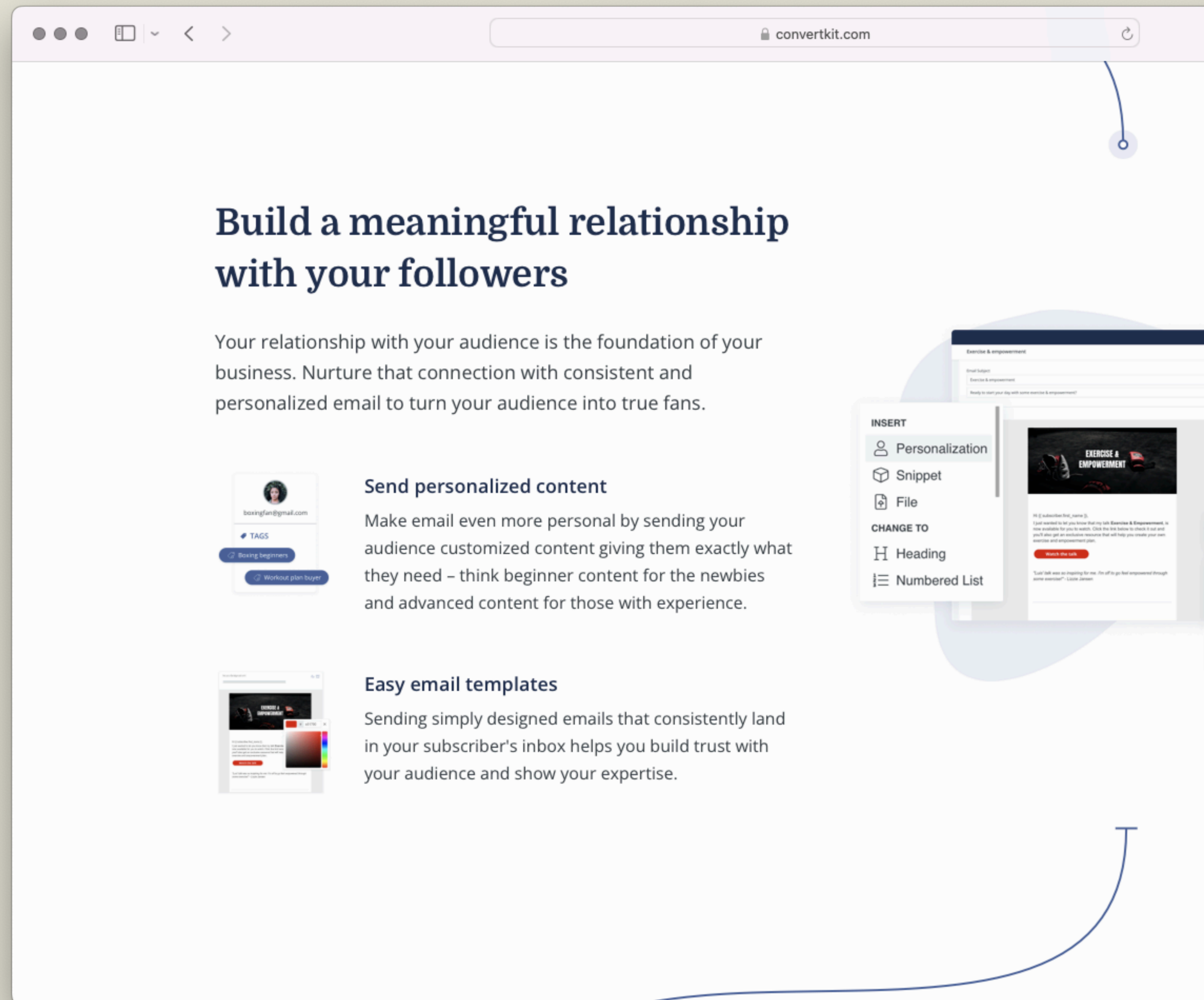
Preparing and Sending Your Survey Email

Segment your audience

Those we consider
influencers

Those who didn't reply to
your previous email.

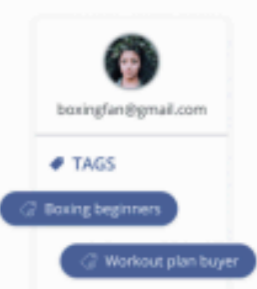
Those who did reply.




convertkit.com

Build a meaningful relationship with your followers

Your relationship with your audience is the foundation of your business. Nurture that connection with consistent and personalized email to turn your audience into true fans.

- **Send personalized content**

Make email even more personal by sending your audience customized content giving them exactly what they need – think beginner content for the newbies and advanced content for those with experience.
- **Easy email templates**

Sending simply designed emails that consistently land in your subscriber's inbox helps you build trust with your audience and show your expertise.

INSERT

- Personalization
- Snippet
- File

CHANGE TO

- Heading
- Numbered List

EXERCISE & EMPOWERMENT

Hi [subscriber first name],

I just wanted to let you know that my latest **Exercise & Empowerment** is now available for you to watch. Click the link below to check it out and you'll also get an exclusive resource that will help you create your own exercise and empowerment plan.

[Watch the link](#)

You'll talk with me happening for me. One of the go-to that empowered through some awesome! - Luke Johnson

Influencer email

Make the subject clear and reference the previous communication.



Next Step in the charity report we discussed

To: Lucy Hardy, Cc: Bcc:

From: Paul Boag (paul@boagworld.com)

Subject: Next Step in the charity report we discussed

B I U San Francisco 14

Hi Lucy,
You may remember I emailed you in regards to a report we are creating on user experience in the charity sector. I mentioned I was interested in your feedback as to what it should cover.

[I have now prepared a survey that I would love you to complete.](#) I will use it to inform the final report. It should only take 5 minutes to complete. Obviously in return, I will send you a copy of the final report when it is complete.

Also, feel free to share this with your network if you think it is of value. The more responses we get, the more accurate the final result.

If you have any feedback on the survey or may be would even like to collaborate on it, drop me a reply and we can always setup a call. I would love to chat.

Thanks.
Paul

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Influencer email

Remind them that they know you and what it is you are doing. Make it clear why you are contacting them.



Next Step in the charity report we discussed

To: Lucy Hardy, Cc: Bcc:

From: Paul Boag (paul@boagworld.com)

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Influencer email

Introduce the survey and make it clear what you want them to do and what they will get in return. Emphasize it won't take long.



Next Step in the charity report we discussed

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Influencer email

Encourage them to share the survey and explain why that is worth their time.



Next Step in the charity report we discussed

To: Lucy Hardy, Cc: Bcc:

From: Paul Boag (paul@boagworld.com)

Subject: Next Step in the charity report we discussed

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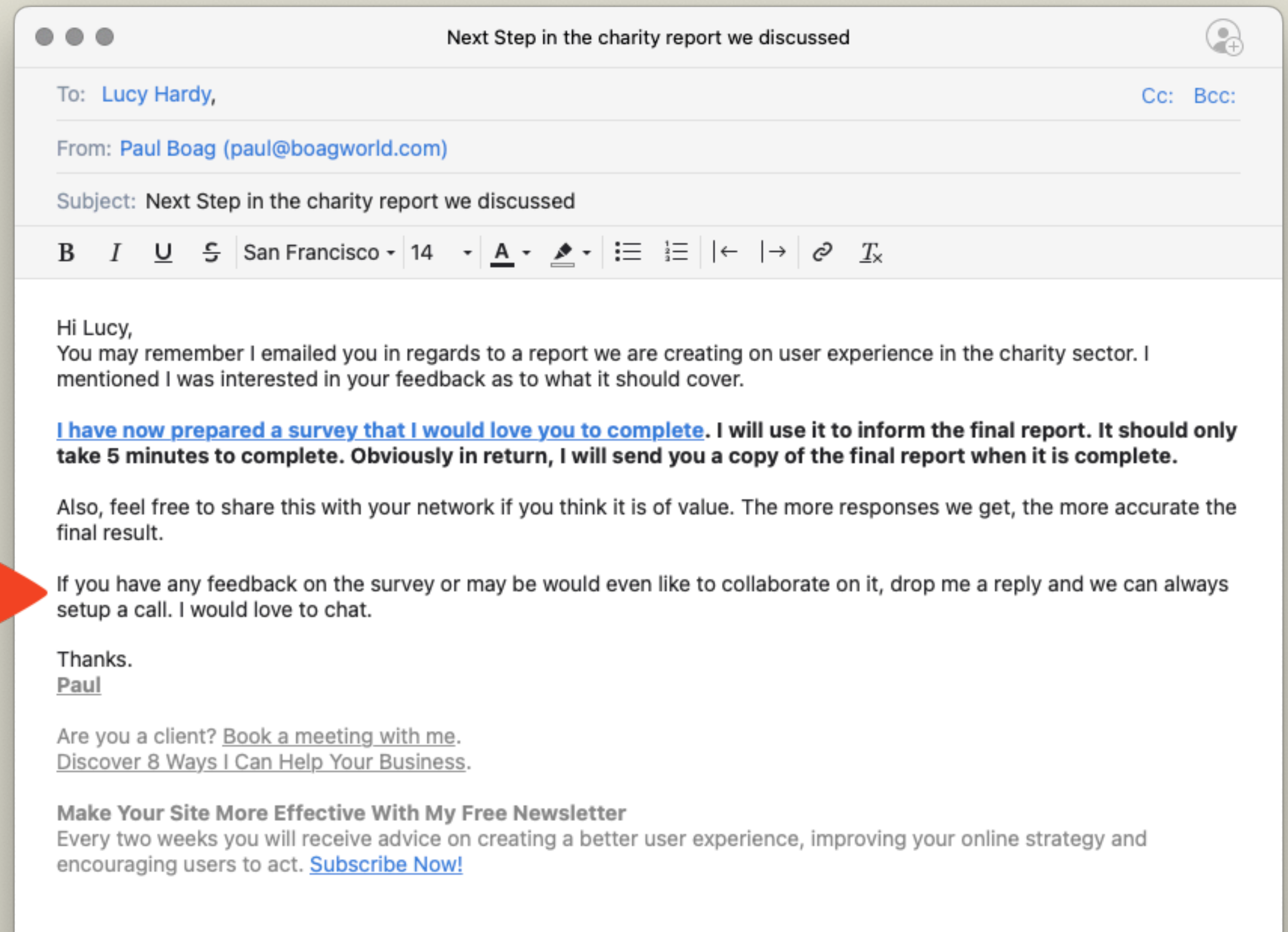
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Influencer email



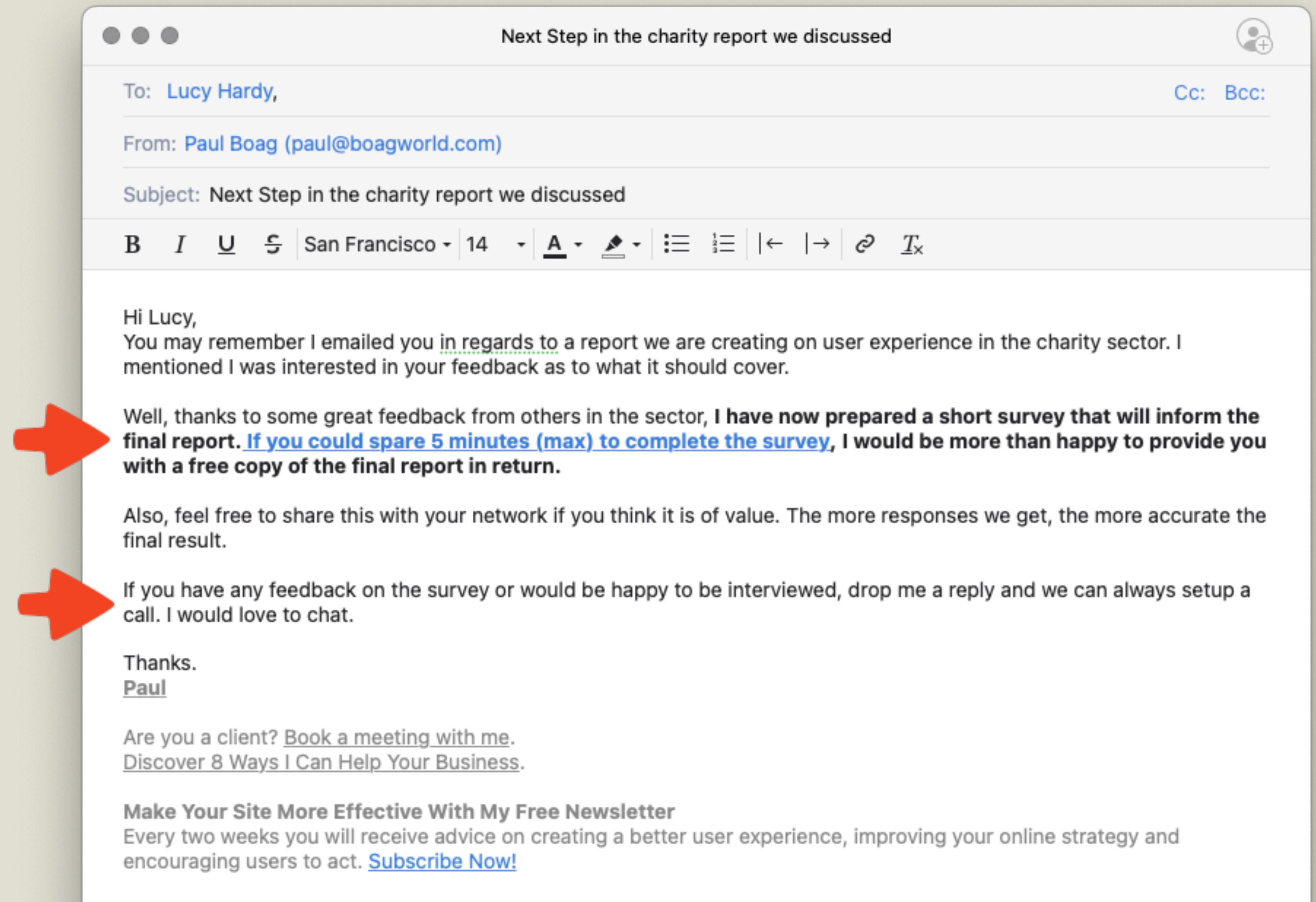
Make it more personal and use it as an opportunity to directly engage.



'No contact' email

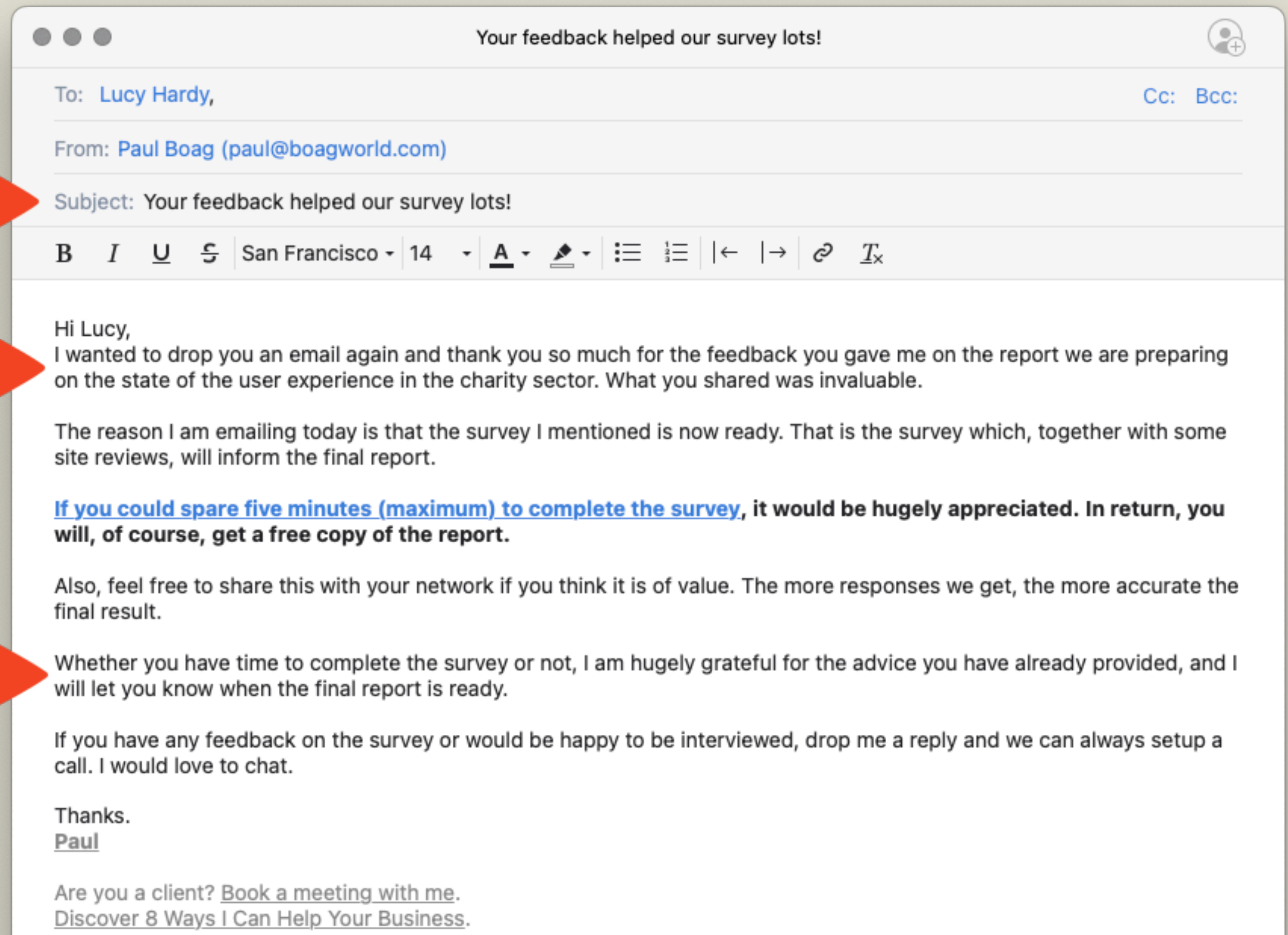
I have added a but emphasizing how others have got involved and they are missing out.

Instead of collaborating I have asked if they would be willing to be interviewed.



'Contact' email

Show appreciation for their previous contributions and demonstrate how that has made a difference to your approach.



**Using site audits to
encourage a
response.**

Optional, but worthwhile.

Why include site audits in your strategy

It will improve the quality of your report.

It will give you more content for the report.

People love to know how they rank,
especially when compared to competitors.

It encourages people to contact you.

Use a scorecard approach

Identify a small number of criteria related to your report.

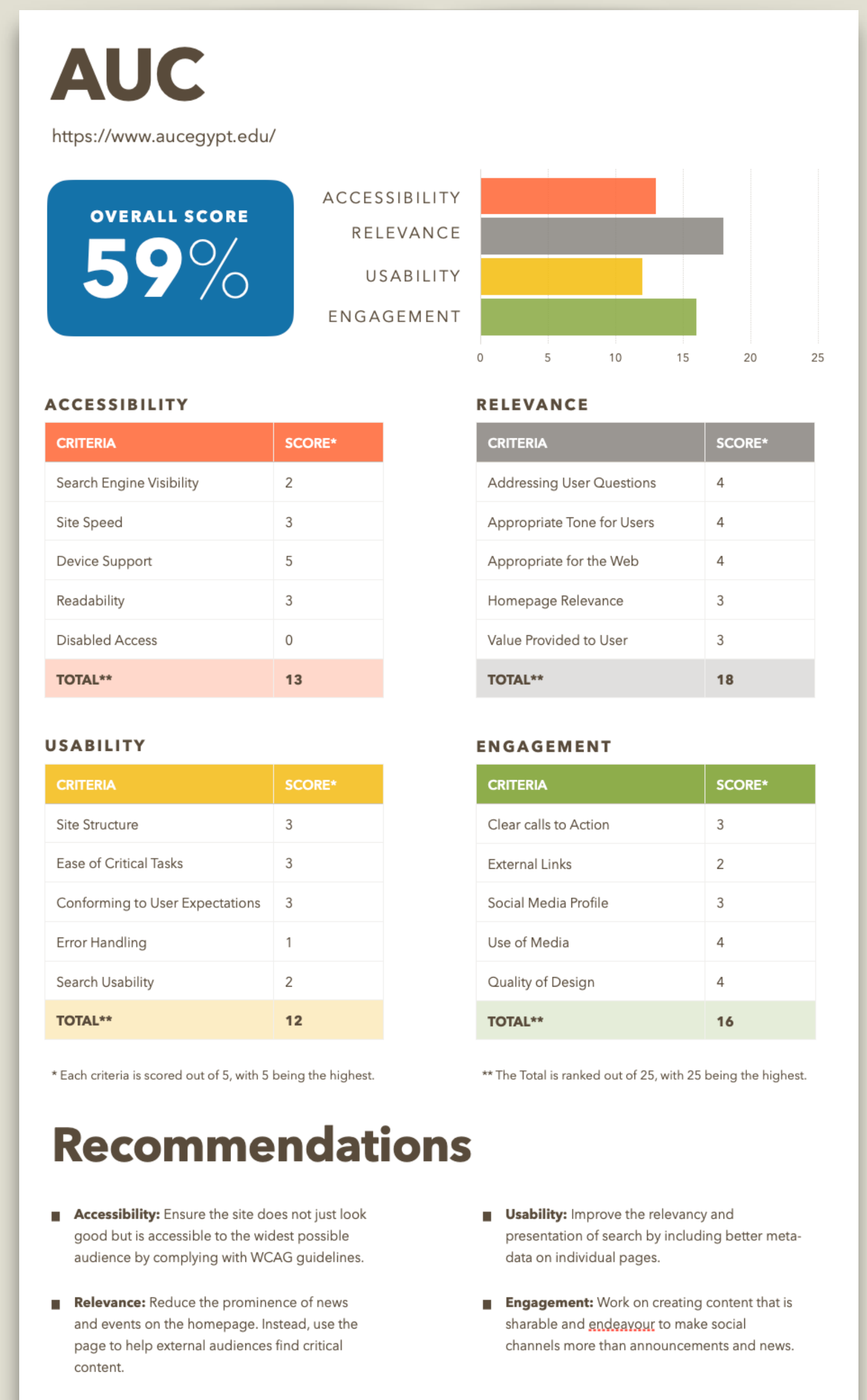
Rank the site against each criteria using a simple 1-5 rating.

Use automated tools where possible (e.g. using [GTMetrix](#) for performance).

Write a few short recommendations for each criteria.

Spend no more than 30 minutes on each review.

Don't feel the need to review every site in your list.



Publish a league table

USABILITY

	CONFORMING TO USER EXPECTATIONS	EASE OF CRITICAL TASKS	ERROR HANDLING	SEARCH USABILITY	SITE STRUCTURE	TOTAL**
NILE	3	4	2	2	5	16
AUC	3	3	1	2	3	12
PHAROS ALEXANDRIA	3	3	1	2	2	11
AIN SHAMS	3	1	1	3	2	10
DAMIETTA	1	3	3	3	0	10
SOUTH VALLEY	2	2	0	3	3	10
AL-AZHAR	3	2	0	1	3	9
ALEXANDRIA	2	2	2	1	2	9
BENHA	2	2	2	1	1	8
FAYOUM	2	1	1	2	2	8
HELWAN	2	3	0	1	2	8
SUEZ CANAL	2	2	0	2	2	8
TANTA	2	2	0	2	2	8
ASSIUT	1	3	1	0	2	7
KAFREL SHEKH	2	2	0	0	3	7
ASWAN	2	1	1	1	1	6
MANSOURA	2	0	0	2	2	6
PORT SAID	1	1	1	2	1	6
SOHAG	2	1	1	0	2	6
CAIRO	1	0	0	2	2	5
MINOUFIA	2	1	1	0	1	5
BENI SUEF	1	2	0	0	1	4
ZAGAZIG	1	2	0	0	1	4
MINIA	1	1	0	0	1	3

ACCESSIBILITY

	SEARCH ENGINE VISIBILITY	SITE SPEED	DEVICE SUPPORT	READABILITY	DISABLED ACCESS	TOTAL**
AUC	2	3	5	3	0	13
ASSIUT	1	1	5	2	0	9
NILE	1	0	4	3	1	9
SOUTH VALLEY	1	3	0	3	2	9
ASWAN	1	0	5	1	1	8
MINOUFIA	1	1	3	1	1	7
TANTA	1	1	1	2	2	7
FAYOUM	1	0	0	3	2	6
MANSOURA	1	1	2	2	0	6
PHAROS ALEXANDRIA	0	0	4	2	0	6
ALEXANDRIA	1	0	3	1	0	5
CAIRO	1	0	3	1	0	5
DAMIETTA	0	2	1	2	0	5
AIN SHAMS	1	0	1	1	1	4
BENHA	1	0	3	0	0	4
HELWAN	1	0	2	1	0	4
KAFREL SHEKH	1	0	2	1	0	4
MINIA	1	1	0	1	1	4
PORT SAID	0	0	3	0	1	4
SUEZ CANAL	1	0	2	1	0	4
SOHAG	1	0	2	0	0	3
AL-AZHAR	1	0	1	0	0	2
BENI SUEF	0	0	2	0	0	2
ZAGAZIG	0	1	0	1	0	2

TOTAL SCORE

UNIVERSITY	SCORE
AUC	59
NILE	49
PHAROS ALEXANDRIA	34
ASSIUT	29
TANTA	28
AIN SHAMS	27
SOUTH VALLEY	26
ALEXANDRIA	24
DAMIETTA	23
MANSOURA	22
BENHA	21
AL-AZHAR	21
SOHAG	21
ASWAN	20
CAIRO	20
FAYOUM	20
MINIA	20
KAFREL SHEKH	19
SUEZ CANAL	19
MINOUFIA	19
ZAGAZIG	17
HELWAN	16
BENI SUEF	14
PORT SAID	13

RELEVANCE

	ADDRESSING USER QUESTIONS	APPROPRIATE TONE FOR USERS	APPROPRIATE FOR THE WEB	HOME PAGE RELEVANCE	VALUE PROVIDED TO USER	TOTAL**
AUC	4	4	4	3	3	18
NILE	2	2	3	3	2	12
AIN SHAMS	1	1	2	3	1	8
PHAROS ALEXANDRIA	2	1	2	1	2	8
ASSIUT	2	1	2	1	1	7
MANSOURA	2	1	1	2	1	7
MINIA	2	1	1	2	1	7
AL-AZHAR	1	1	1	2	1	6
CAIRO	1	1	1	2	1	6
TANTA	1	1	1	2	1	6
ZAGAZIG	1	1	1	1	2	6
ASWAN	1	1	2	0	1	5
SOHAG	1	0	2	1	1	5
ALEXANDRIA	1	1	1	0	1	4
KAFREL SHEKH	1	0	1	2	0	4
SOUTH VALLEY	1	0	1	1	1	4
BENHA	0	1	1	1	0	3
HELWAN	0	1	1	1	0	3
FAYOUM	0	1	1	1	0	3
MINOUFIA	0	1	1	1	0	3
PORT SAID	0	1	1	1	0	3
SUEZ CANAL	0	1	1	1	0	3
BENI SUEF	0	1	1	1	0	3
PHAROS ALEXANDRIA	0	1	1	1	0	3
CAIRO	0	1	1	1	0	3
ASWAN	0	1	1	1	0	3
SOHAG	0	1	1	1	0	3
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HELWAN	0	1	1	1	0	3
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SUEZ CANAL	0	1	1	1	0	3
BENI SUEF	0	1	1	1	0	3
PHAROS ALEXANDRIA	0	1	1	1	0	3
CAIRO	0	1	1	1	0	3
ASWAN	0	1	1	1	0	3
SOHAG	0	1	1	1	0	3
AL-AZHAR	0	1	1	1	0	3
MINIA	0	1	1	1	0	3
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FAYOUM	0	1	1	1	0	3
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ASWAN	0	1	1	1	0	3
SOHAG	0	1	1	1	0	3
AL-AZHAR	0	1	1	1	0	3
MINIA	0	1	1	1	0	3
HELWAN	0	1	1	1	0	3
FAYOUM	0	1	1	1	0	3
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PORT SAID	0	1	1	1	0	3
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CAIRO	0	1	1	1	0	3
ASWAN	0	1	1	1	0	3
SOHAG	0	1	1	1	0	3
AL-AZHAR	0	1	1	1	0	3
MINIA	0	1	1	1	0	3
HELWAN	0	1	1	1	0	3
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AL-AZHAR	0	1	1	1	0	3
MINIA	0	1	1	1	0	3
HELWAN	0	1	1	1	0	3
FAYOUM	0	1	1	1	0	3
MINOUFIA	0	1	1	1	0	3
PORT SAID	0	1	1	1	0	3
SUEZ CANAL	0	1	1	1	0	3
BENI SUEF	0	1	1	1	0	3
PHAROS ALEXANDRIA	0	1	1	1	0	3

Compiling a sector-wide expert report.

1. Create a report outline
2. Writing the Initial Draft
3. Edit the Report
4. Design it.

1. Create an outline

Divide the report into 6-8 topics relating to problem areas or trends in the survey and review. Think of each section as a short blog post.

Add a summary at the beginning outlining the topics you will be covering.

Add a short section on the methodology referencing the survey, site audit and any interviews you carried out.

End with a section about you and the benefits of signing up to ongoing advice.

2. Write initial draft

Write
Drunk
Edit Sober

For each section:

Aim for 500-800 words.

Outline findings.

Use survey results (if relevant).

Show examples from audit.

Quote anybody you have spoken to.

Make some **basic** recommendations based on best practice.

3. Edit your report

Grammarly

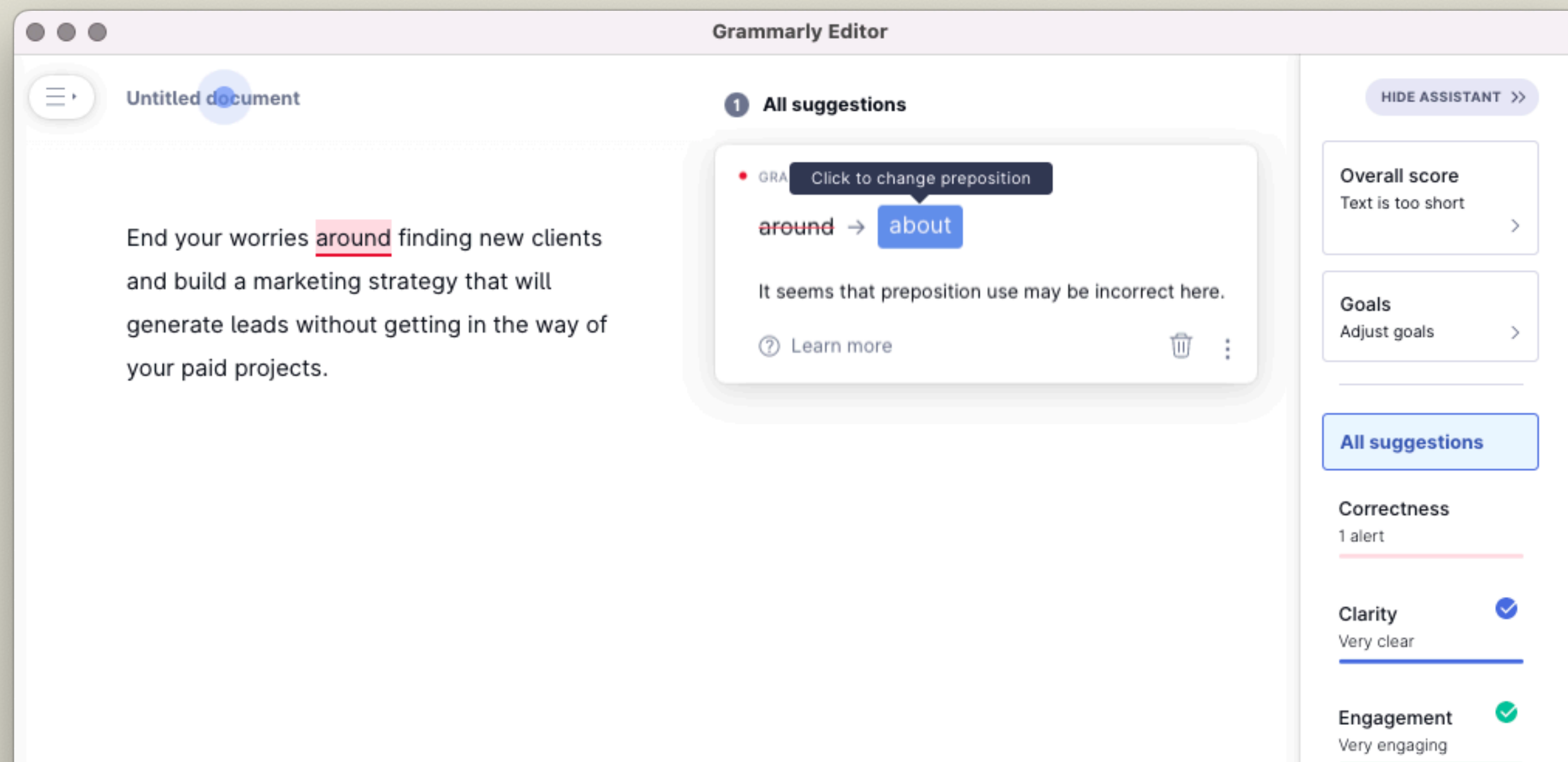
Take your 'drunk' copy and run it through [Grammarly](#). That will identify any typos, spelling mistakes, or poor writing.

Read back

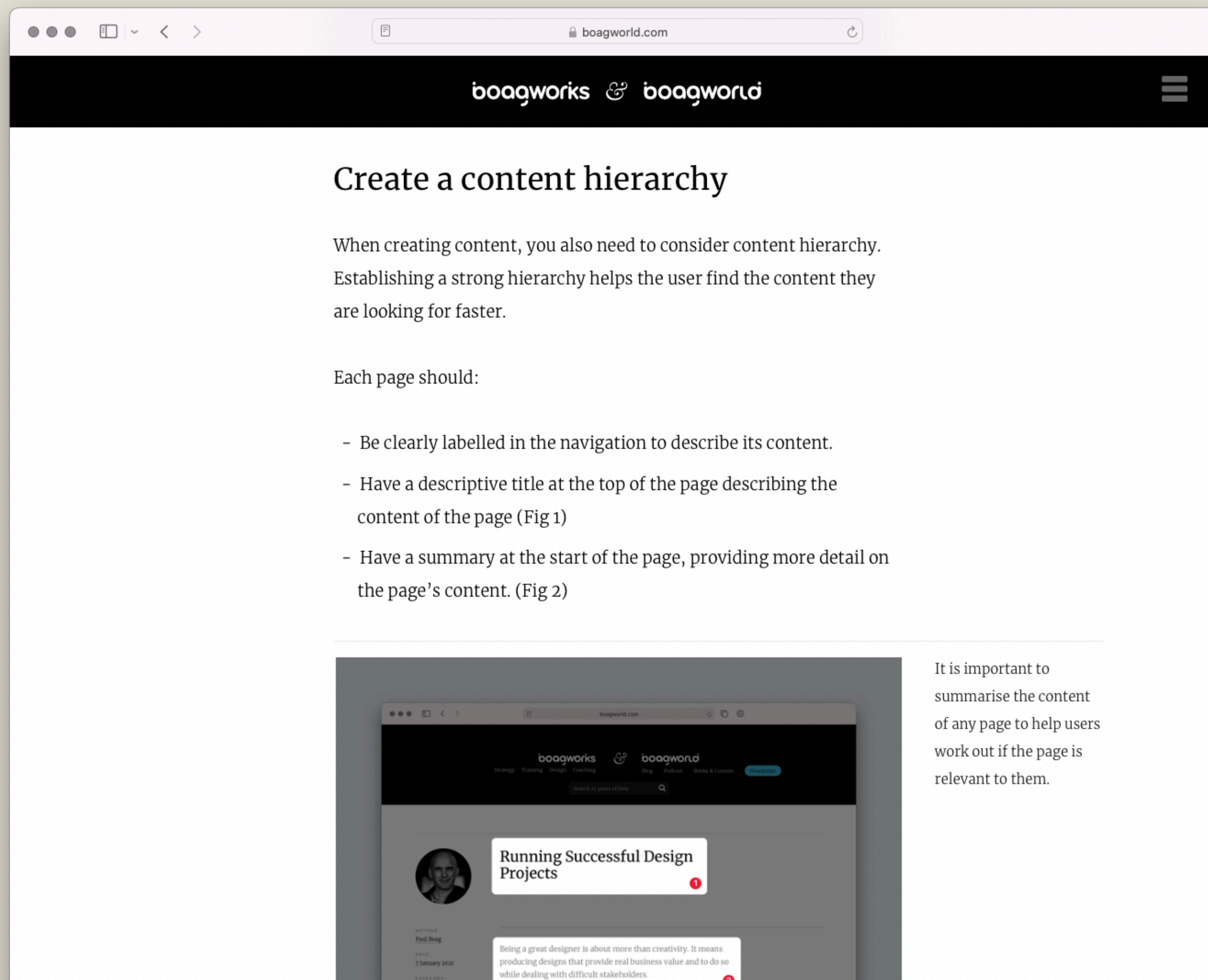
Now read it back out loud. Or even better get your computer to read it back. A computer will read what is actually there.

Stop!

You will be tempted to revise what you have written endlessly. Don't! It will never be perfect. You don't have infinite time.



4. Design it



boagworks & boagworld

Create a content hierarchy

When creating content, you also need to consider content hierarchy. Establishing a strong hierarchy helps the user find the content they are looking for faster.

Each page should:

- Be clearly labelled in the navigation to describe its content.
- Have a descriptive title at the top of the page describing the content of the page (Fig 1)
- Have a summary at the start of the page, providing more detail on the page's content. (Fig 2)

It is important to summarise the content of any page to help users work out if the page is relevant to them.

Make sure it is easy to scan by adding images, headings, bullets and pull out quotes.

If you are not a designer, consider using a service like [fiverr.com](https://www.fiverr.com) to produce the design.

Don't forget to end the report with a strong call to action to signup for your mailing list.

Get your audience's attention checklist

- ✓ **Make initial contact to ask for feedback.**
- ✓ **Prepare a survey and associated landing page.**
- ✓ **Ask people to complete the survey.**
- ✓ **Review some sites and create scorecards.**
- ✓ **Carry out some interviews if appropriate.**
- ✓ **Write the final report.**

Questions

Cold emailing, creating surveys and writing reports can all feel intimidating so if you have questions please ask or email paul@boagworld.com

Get Permission for Ongoing Contact

The chances of your audience hearing from you exactly when they need your services is low. We need their permission to keep in touch until they are ready, and this section shows you how.

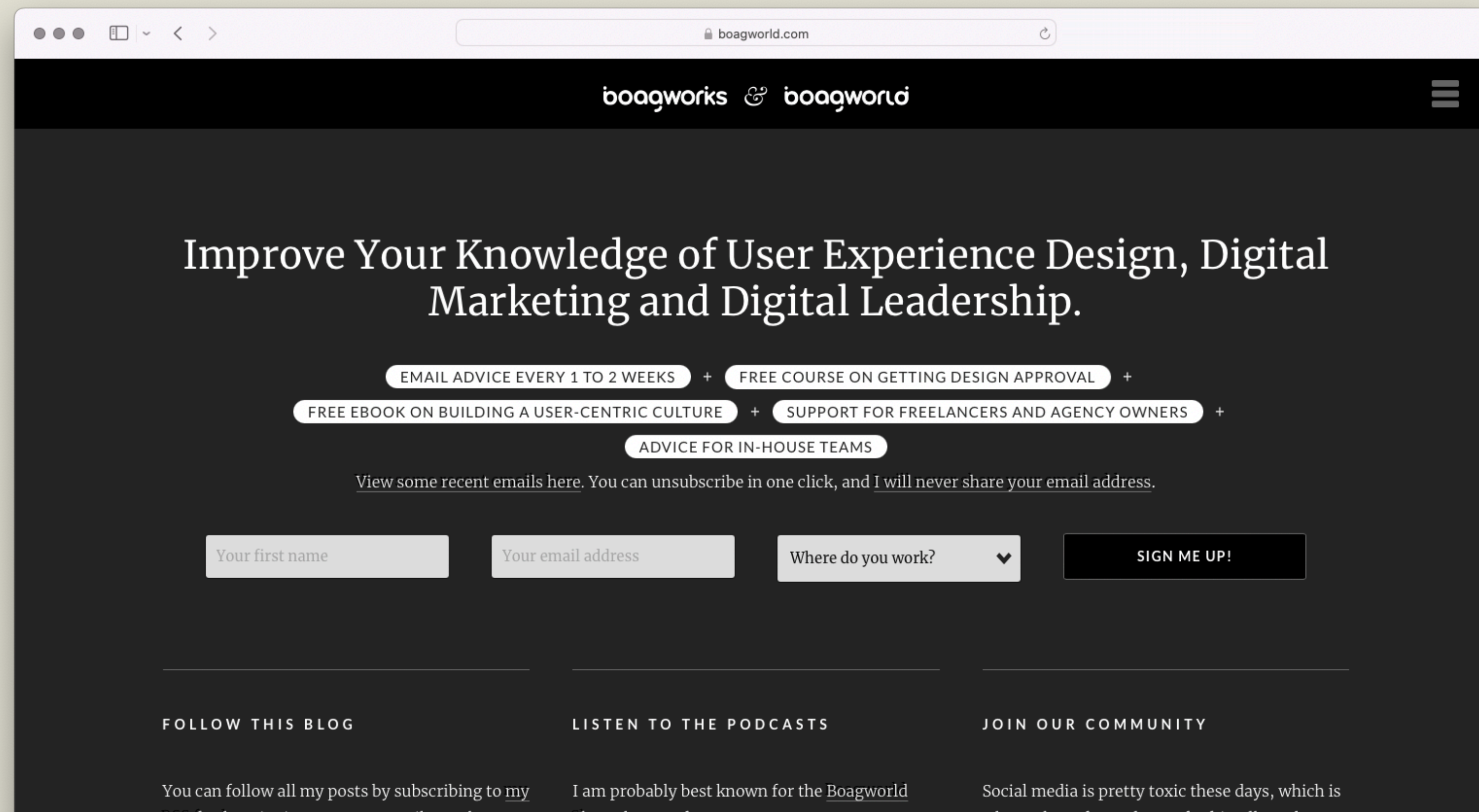
**Why and how to gain
permission to
communicate.**

Why ongoing communication matters

Our survey and report may have got us on our audience's radar, but we need to stay there and continue to build credibility.

It is essential that we are front of mind when they come to need our services and that we are seen as their preferred supplier.

Regular contact via email can provide that.



How to gain the permission we need

Promote the report

We will contact our audience to tell them about the report, reach out to influencers and use other promotion techniques.

Provide an email course

Alongside the report, we will offer a short email course that dives deeper into the issues found in the report.

Provide ongoing advice

After people finish the course, they will continue to hear from us via monthly emails offering ongoing advice.

**Designing a landing
page that encourages
permission.**

Landing page objectives

Establish your credibility.

Create desire for the course and report.

Encourage signups.

At this stage, **it is not about selling your services**. As a result, do not make it a part of your existing website, although it can share the design.

Landing page content

About

Outline the main topics of the report and email course and a couple of the key findings.

Benefits

- Instant access to the report.
- Actionable advice for improving your site.
- Awareness of the competitive landscape.
- Evidence to support your requests to management.
- Insights into areas of innovation.

Credibility

Write a couple of short sentences about your credibility and the various sources that contributed to the report.

Create a compelling call to action

boagworks & boagworld

Improve Your Knowledge of User Experience Design, Digital Marketing and Digital Leadership.

EMAIL ADVICE EVERY 1 TO 2 WEEKS + FREE COURSE ON GETTING DESIGN APPROVAL + FREE EBOOK ON BUILDING A USER-CENTRIC CULTURE + SUPPORT FOR FREELANCERS AND AGENCY OWNERS + ADVICE FOR IN-HOUSE TEAMS

[View some recent emails here.](#) You can unsubscribe in one click, and I will never share your email address.

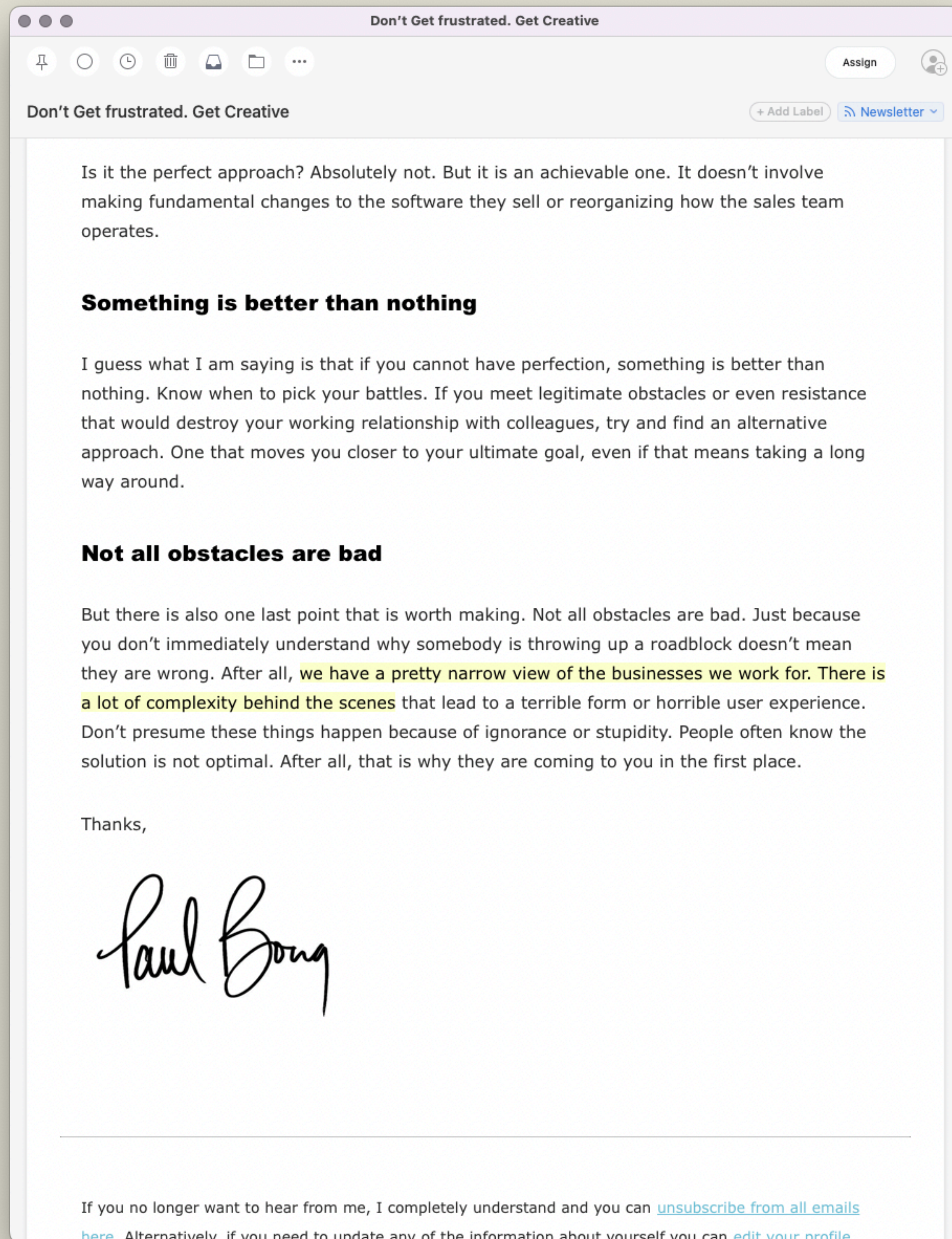
Your first name Your email address Where do you work?

FOLLOW THIS BLOG LISTEN TO THE PODCASTS JOIN OUR COMMUNITY

You can follow all my posts by subscribing to my I am probably best known for the Boagworld Social media is pretty toxic these days, which is

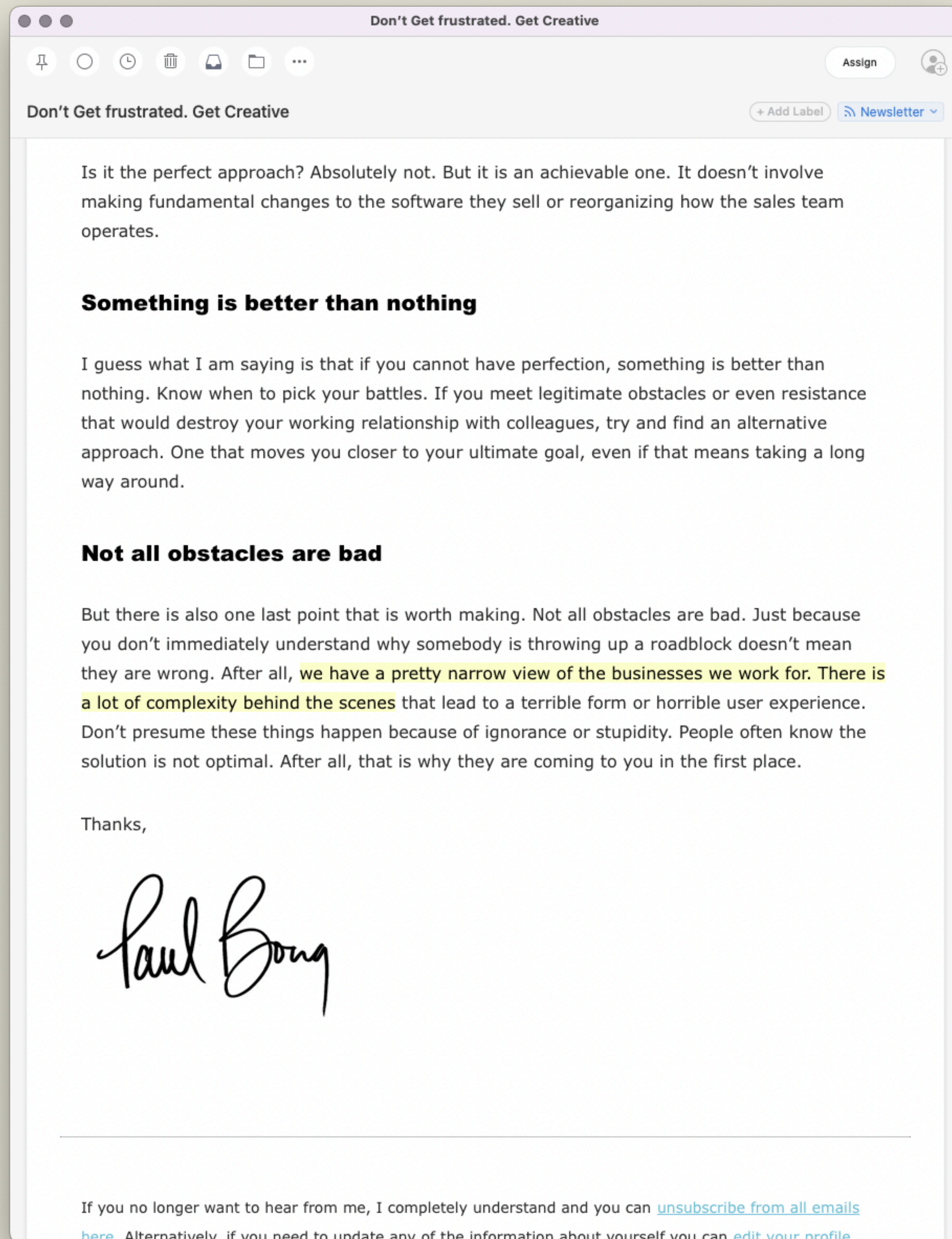
- Be clear about what people will get.
- Consider charging for non-subscribers.
- Consider making free for limited time.
- Tackle any objections people may have.

**Crafting an email
course.**



How to structure your email course

- One email for each topic.
- Scheduled weekly.
- About 500 words each.
- Basic formatting to aid scanability.



Writing each email

Recap

Recap briefly a challenge or piece of best practice from the report you wish to focus on in that email.

Advise

Provide a few practical tips about how to address that challenge or take a step closer to that best practice.

Engage

Encourage people to contact you if they are struggling and have questions.

Don't hold back

Share all the advice you have freely. Don't worry about people doing it themselves and not hiring you. People will still reach out because they don't have the time or feel too intimidated to try themselves.

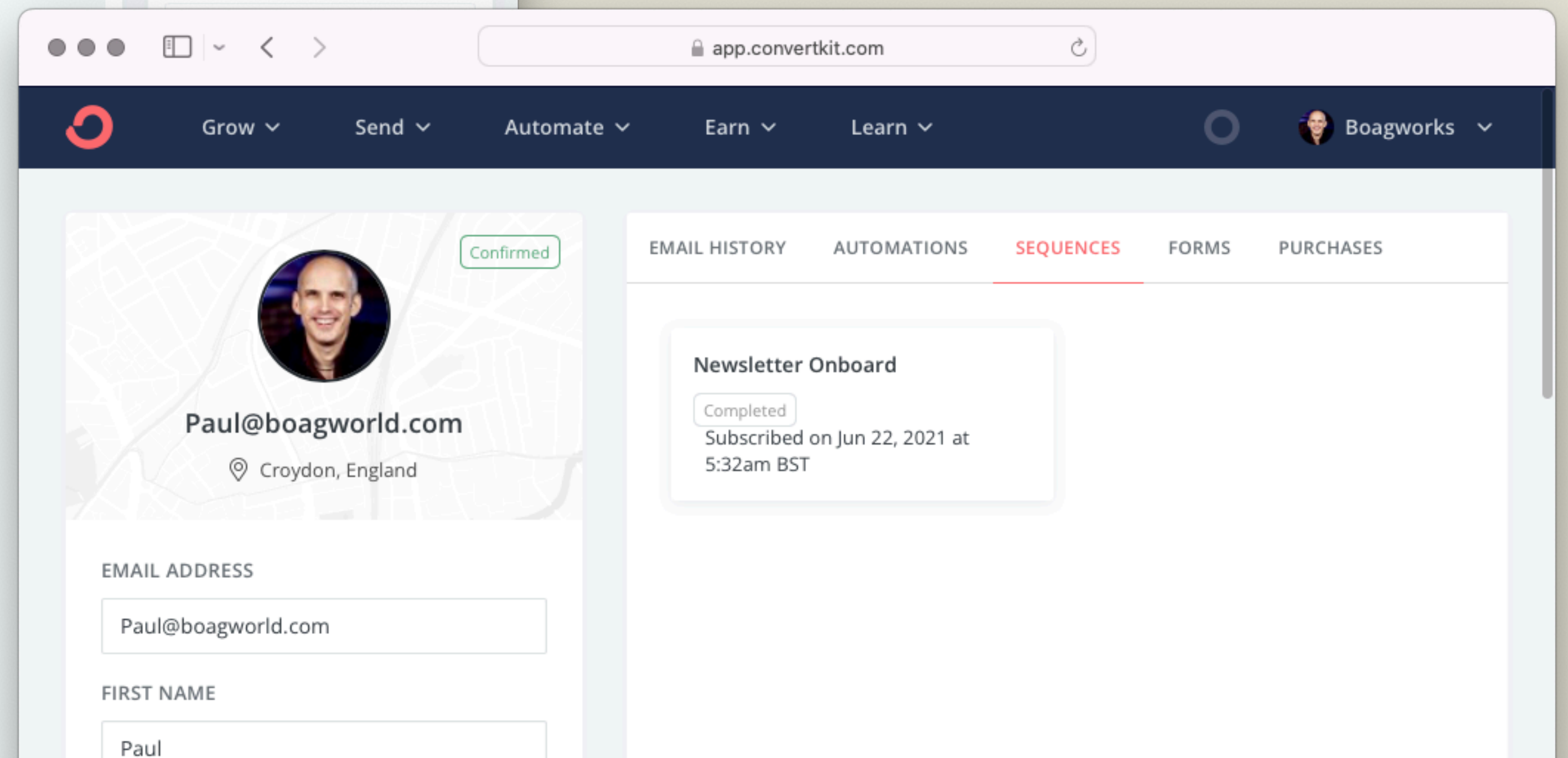
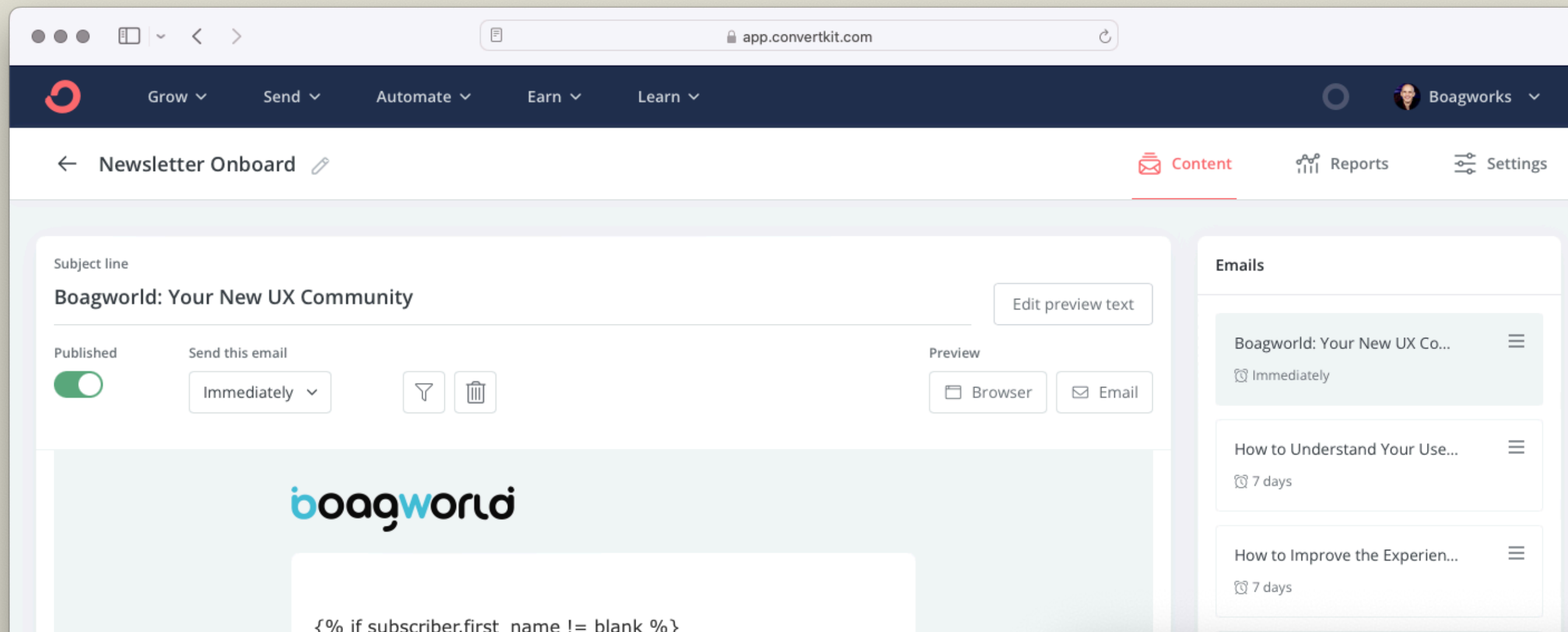
Still do not sell

There is no need to promote your services actively. Be open about what you do and even recommend that they should hire 'somebody,' but don't push yourself.

Automate

Even though people will enroll on your mailing list at different times, we still want everybody to pass through the same course before proceeding to your regular monthly emails.

To achieve this, we will need to use a tool like Convertkit that will add users to your email course when they subscribe and then tag them when they have completed it so you can start sending them regular emails.



**Email our audience
about the report.**

Survey Participants

Make it clear what the email is about and show your appreciation.



Your promised report, with a big thank you!

To: Lucy Hardy, Cc: Bcc:

From: Paul Boag (paul@boagworld.com)

Subject: Your promised report, with a big thank you!

B I U San Francisco 14

Hi Lucy,
First of all, let me thank you for taking the time to complete our survey on the state of digital fundraising in the charity sector. Along with the input of many others, it has enabled us to get a clearer picture.

Thanks to you, the report covers:

- ...
- ...
- ...
- ...
- ...

As promised, we have attached your copy of the report as a thank you for participating.

You will also find attached a heuristic review of your website benchmarking your site against others in the sector. That is because your site was selected as one of a sample to inform the report. We thought you might be interested in the results.

The response to the report has proved so encouraging that we have also created an email course exploring the issues it raises in more details.

The course covers:

- ...
- ...
- ...
- ...
- ...

If the email course sounds of interest, [you can subscribe for free here.](#)

If you have any questions or comments about any of the above, we would be delighted to discuss it with you.

Thanks.
Paul

Are you a client? [Book a meeting with me.](#)
[Discover 8 Ways I Can Help Your Business.](#)

Send

Survey Participants

Again, show your appreciation and remind them about the previous conversations. Also, make them feel a part of something bigger.



Your promised report, with a big thank you!

To: Lucy Hardy, Cc: Bcc:

From: Paul Boag (paul@boagworld.com)

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B I U San Francisco 14

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Are you a client? [Book a meeting with me.](#)
[Discover 8 Ways I Can Help Your Business.](#)

Send

Survey Participants

Because the topics are based on survey results, they will be particularly relevant and will hopefully grab the readers attention.



Your promised report, with a big thank you!

To: Lucy Hardy, Cc: Bcc:

From: Paul Boag (paul@boagworld.com)

Subject: Your promised report, with a big thank you!

B I U San Francisco 14 **A** **↶ ↷** **🔗** **🔍**

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Are you a client? [Book a meeting with me.](#)
[Discover 8 Ways I Can Help Your Business.](#)

Send **🔗** **🕒** **📧** **🔗** **Tl**

Survey Participants

Make the call to action as compelling and relevant as you possibly can.



Your promised report, with a big thank you!

To: Lucy Hardy, Cc: Bcc:

From: Paul Boag (paul@boagworld.com)

Subject: Your promised report, with a big thank you!

B I U San Francisco 14 **A** |←|→|

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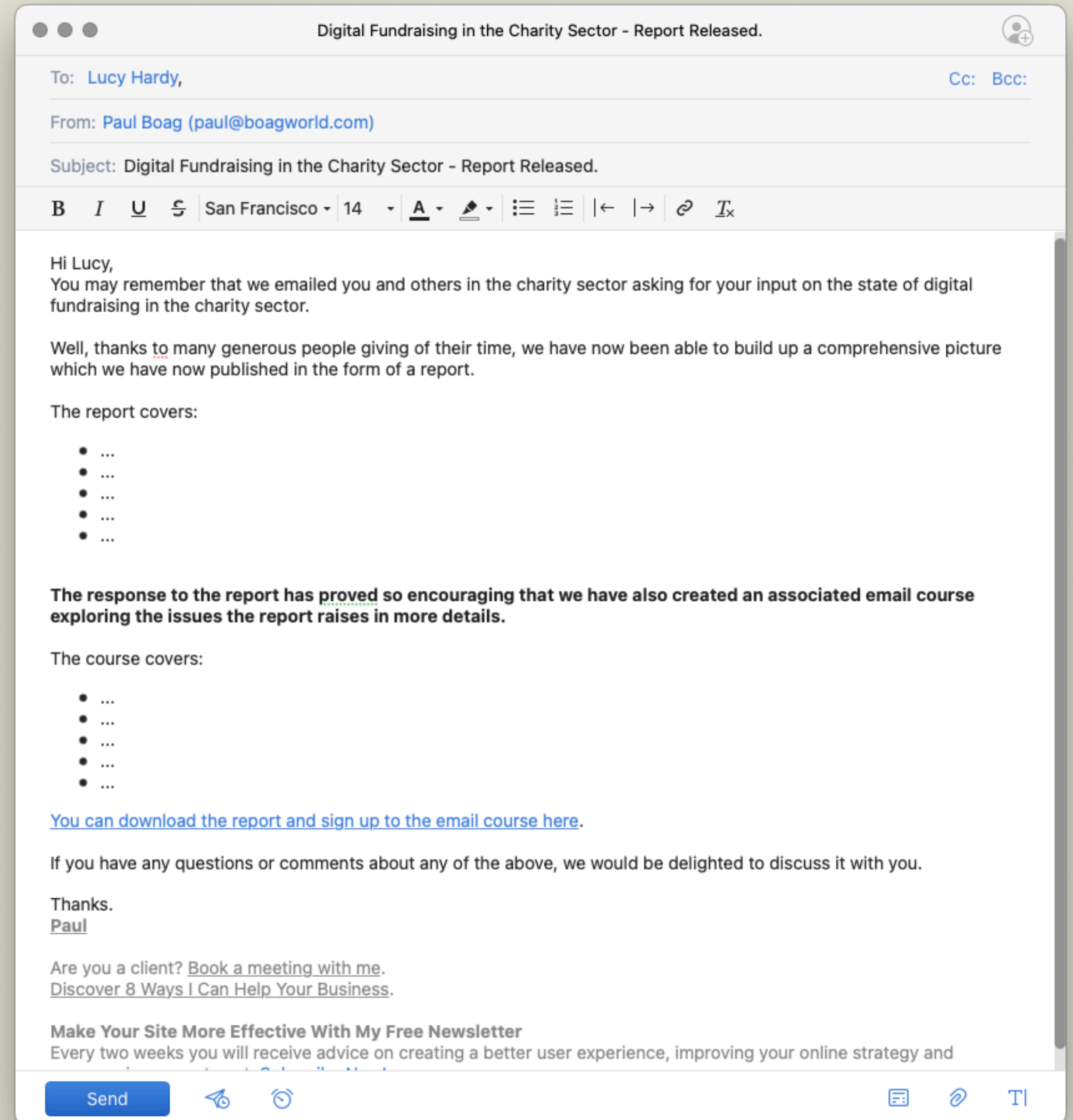
Thanks,
Paul

Are you a client? [Book a meeting with me.](#)
[Discover 8 Ways I Can Help Your Business.](#)

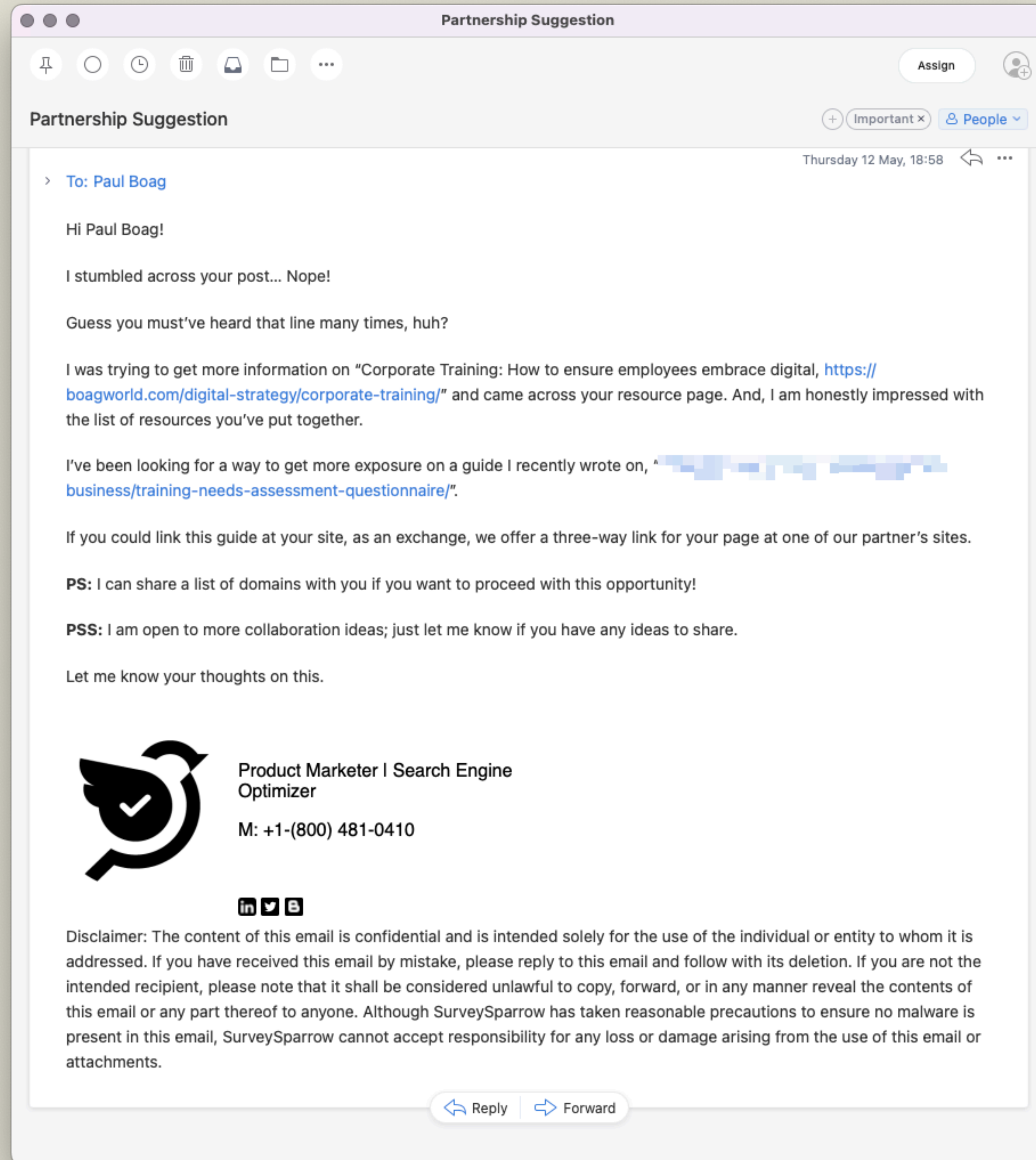
Send | | | | |

Those who did not complete survey

Send a variation to those who did not complete the survey. They will only get the report if they also sign up for ongoing communications.



**Reach out to
influencers.**



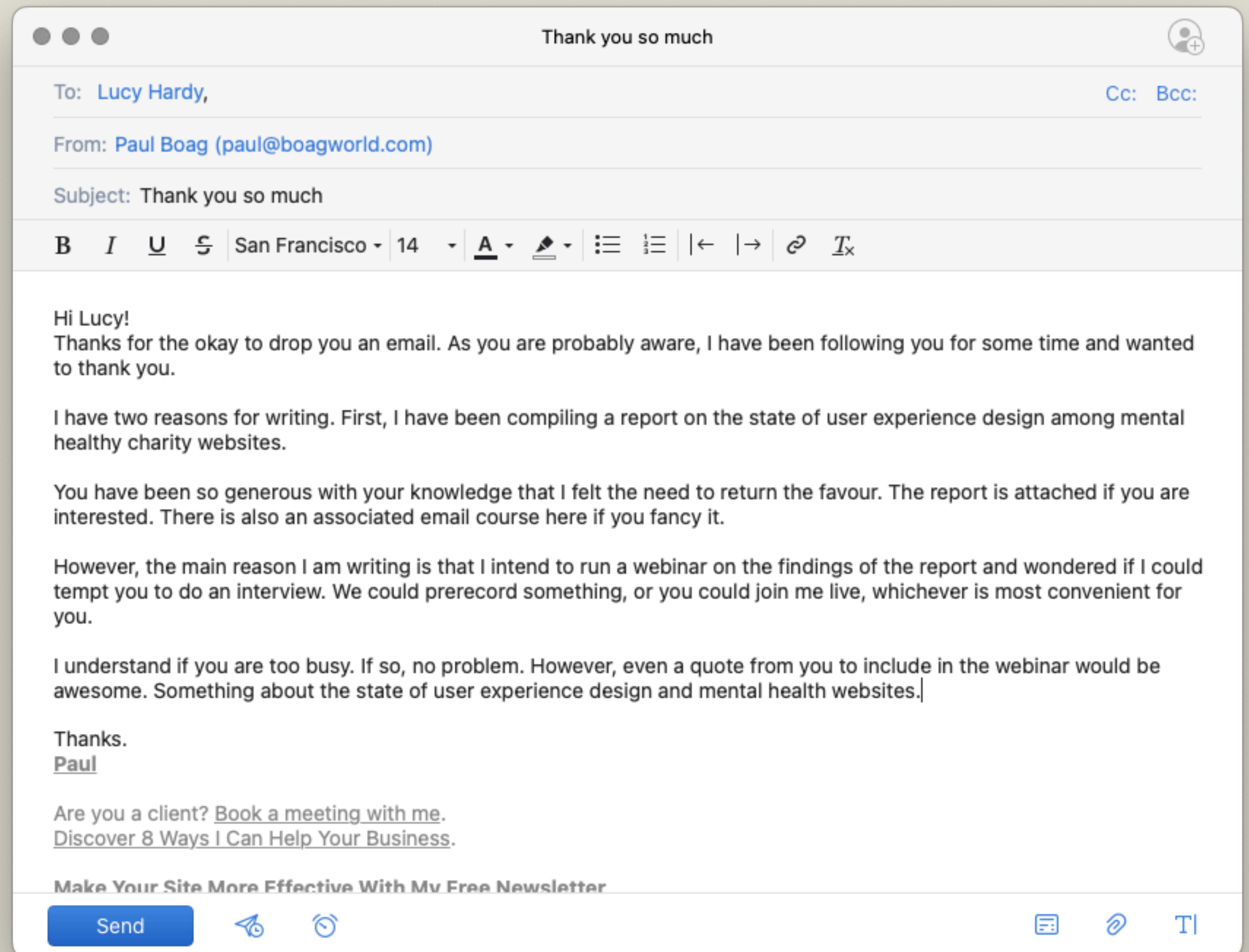
The trouble with influencers

Even a niche influencer like myself gets dozens of emails a week asking for everything from links to promotions via social media. With so much noise, a single email will not get their attention.

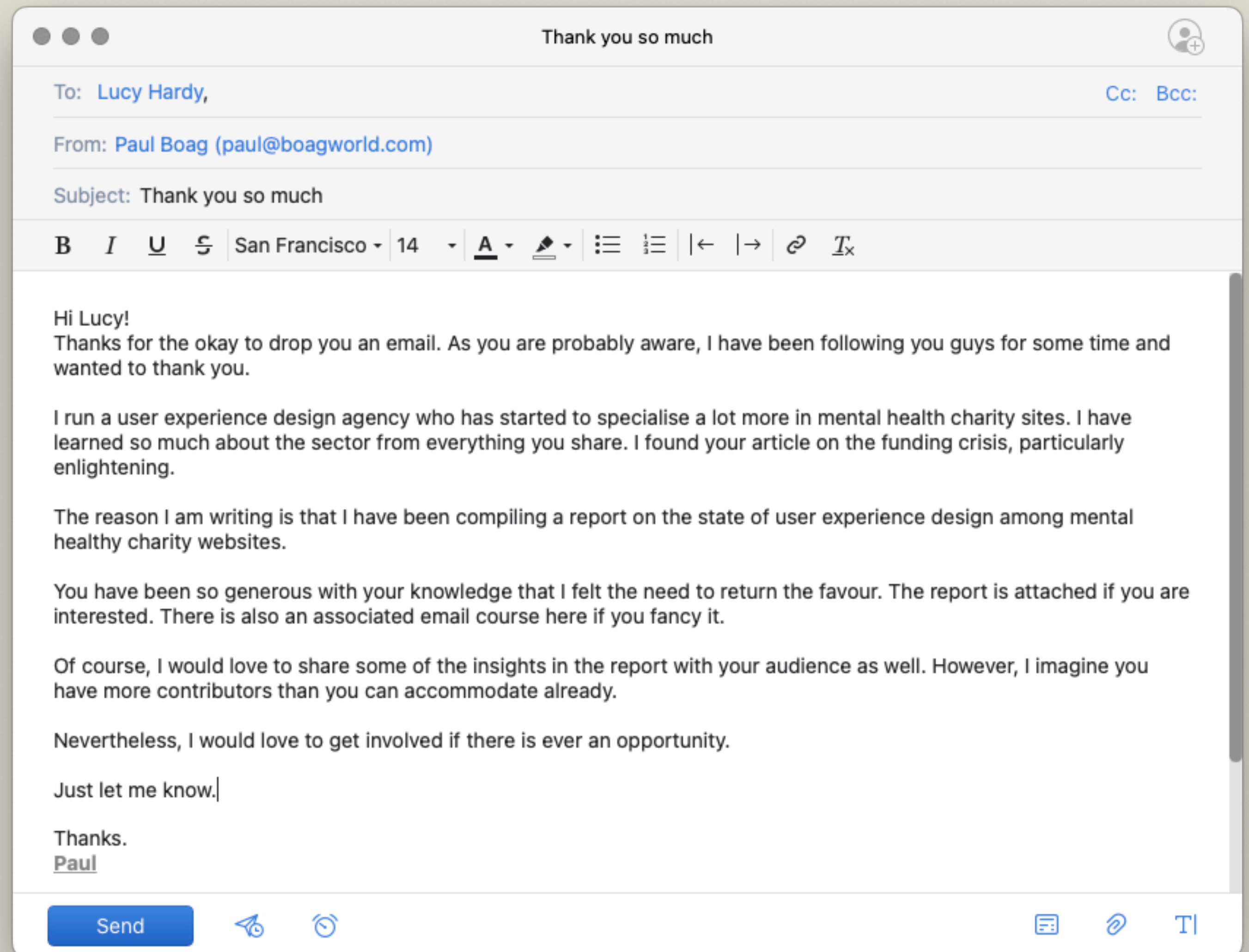
How to engage influencers

- Build a relationship.
- Be helpful.
- Be encouraging and grateful.
- Amplify their content.
- Only contact them directly once they have responded to you a few times.
- Ask permission to email.

Emailing an influencer



Emailing an influencing publication



**Reusing all of your
hard work**

Recycle your content and use it to attract attention

**Emails
and the report**



**Blog posts,
webinars and
social media**

Turn your report into posts

Ideally we will want to take our content and turn it into guest posts. However, failing that we can post them on our website but optimized for search keywords using a tool like kwfinder.com.

- Decide on a question you can answer using content from your report.
- Write your post using the same editorial process you used for the report.
- Include a clear call to action to signup for the report and email.
- Promote on social.

Turn your report into a webinar

Consider running a webinar based on the report once you have built a following on social and on your mailing list. Webinars are a great way to engage with your audience and personalize the relationship.

- Aim for 40 minutes and lots of time for questions.
- Cover three key findings from your report and your thoughts.
- Add the webinar to your landing page for the report.
- Consider approaching meetups and conferences with the talk.

Automatically Promoting Your Course With Social Media

Creating social media updates from your content

Content people love to share.

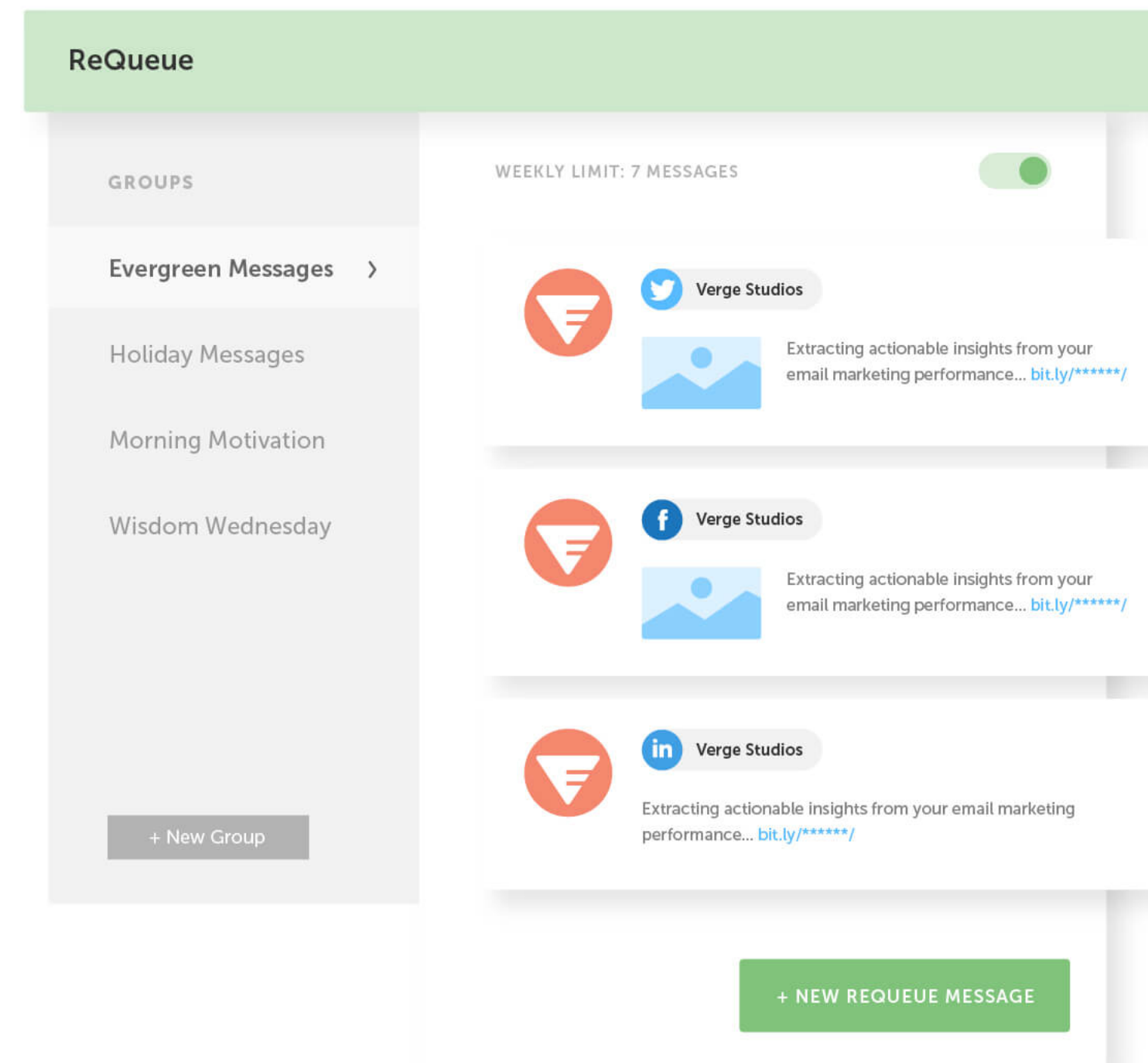
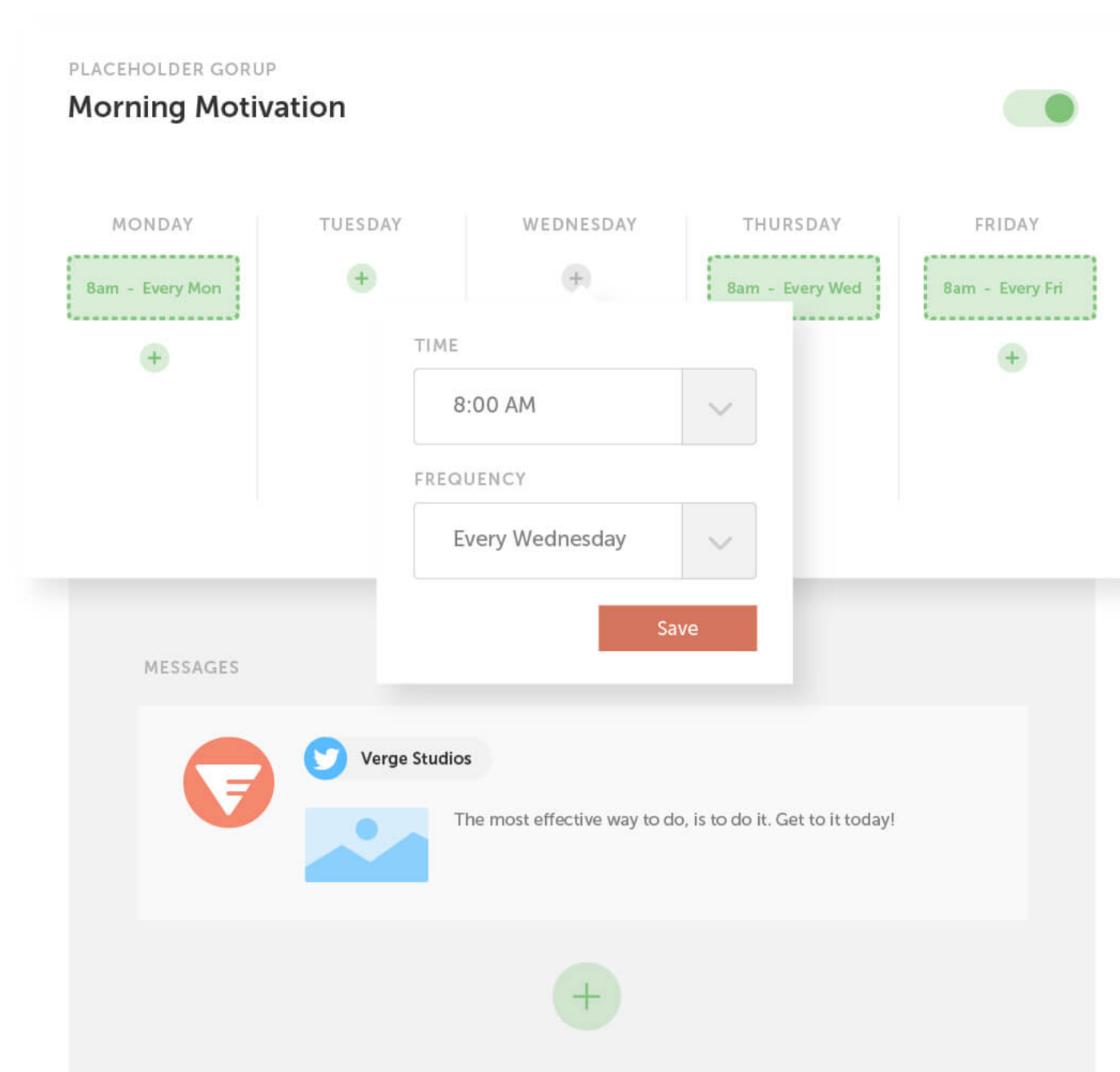
- Statistics, to make people appear clever.
- Quotes, that people can agree with.
- Practical actions and advice to make people look helpful

Formats to use

- Video and audio from your webinar.
- Quotes from your report shown as images using something like [Pablo](#).
- Include links to your landing page.
- Include relevant hashtags.
- Mention influencers where relevant.

Automating your social media with coschedule

Schedule via their editorial calendar or automatically alongside posts in Wordpress.



Fill in the gaps in your schedule with evergreen posts using their requeue function.

Establishing contact checklist


- ✓ Write an email course around the report findings.
- ✓ Create a landing page to sell your report and email course.
- ✓ Email your audience about the report.
- ✓ Reach out to influencers.
- ✓ Recycle your content into other formats to attract a bigger audience.
- ✓ Automated your social media.

Questions

This is the biggest section of work and can be somewhat overwhelming. Feel free to ask me questions anytime on:
paul@boagworld.com

Maintain and Growing Your Audience

Now we are in contact with our audience,
how do you keep them engaged and stop
them from unsubscribing? That is the topic
for this section.



**Planning your
regular mailings.**

How your digital channels fit together

Social

The role of social media is to grab people's attention, encourage sharing and drive traffic to a blog post on a related subject.

Blog

The blog has two roles. First, it is to attract traffic through SEO-targeted posts. Second, it should take any visitors from either search engines or social and drive them to the landing page.

Email

Once on your mailing list, emails will keep you front of mind, slowly building your credibility until they are ready to buy.

What to include in your emails

Personal

Avoid your emails reading like marketing material. Instead, make them personal, friendly, and informal, like any other email you would write.

Helpful

Every email should provide value to the reader. That could be in the form of advice, but it might also be demonstrating empathy over their challenges.

Don't Sell

You can mention your services, but don't sell them. For example, it is okay to say, "as I was preparing for my upcoming workshop on finding clients..."

Inconsistency

Decide on a release schedule and then stick to it. The same time, the same day, every time.

Set aside time to work on these emails. They matter as much as client work.

Infrequent

Your readers cannot be allowed to forget about you. If you only email them a couple of times a year, they will forget you exist. I recommend at least once a month.

Promotional

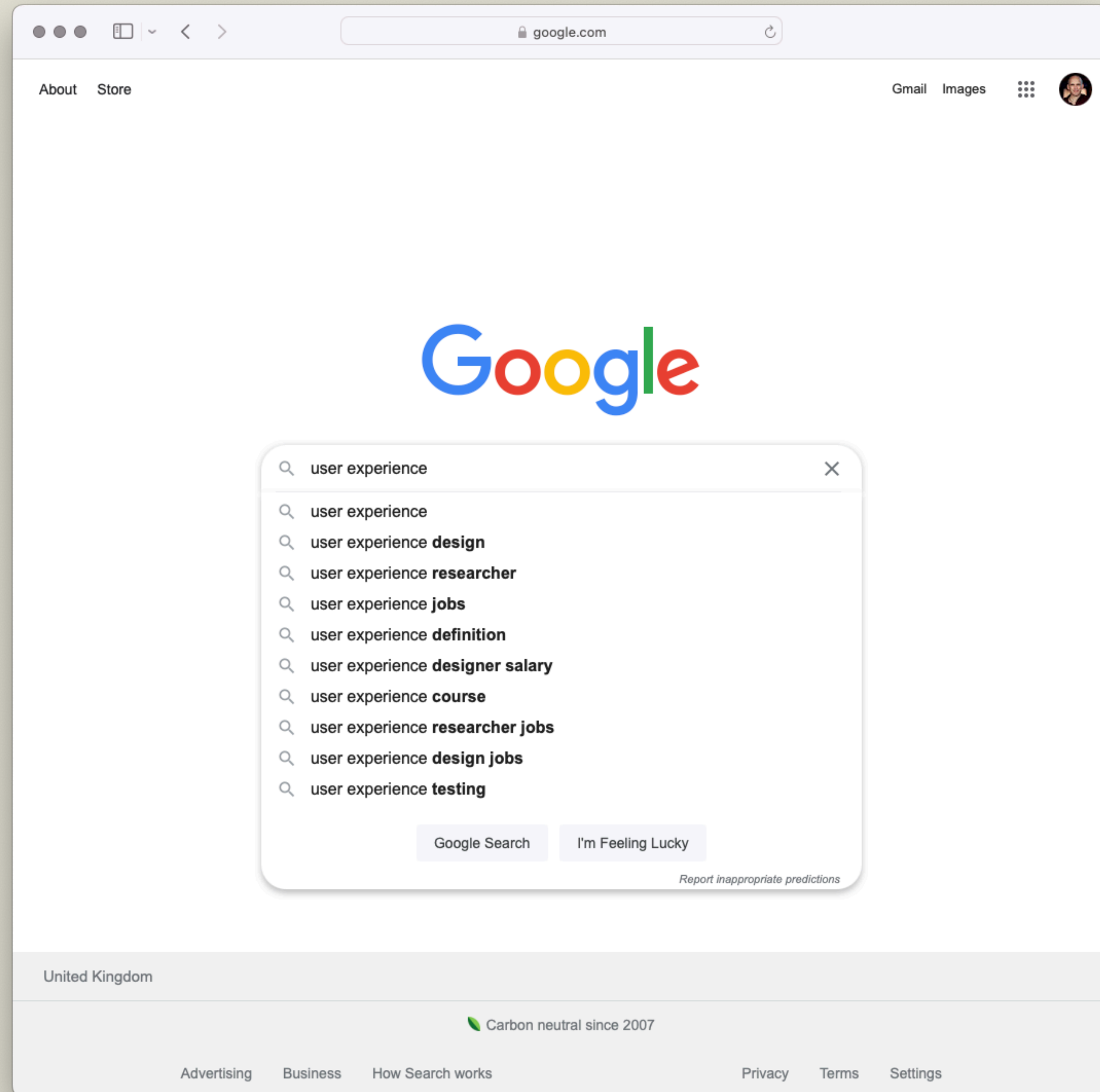
You don't need to sell. Your advice will establish your expertise, and the topics you write about will show your readers what kind of services you offer.

Common mistakes to avoid

How to come up with email topics

**You are
surrounded
by good ideas.
Just pay
attention.**

- Pay attention to conversations you have with clients.
- Keep an eye on subjects being discussed on influencer sites.
- Consider the work you are doing.
- Write around services you offer.
- Talk about the value of what you want to offer.
- Pay attention to what annoys you.
- Keep an eye out for good examples.

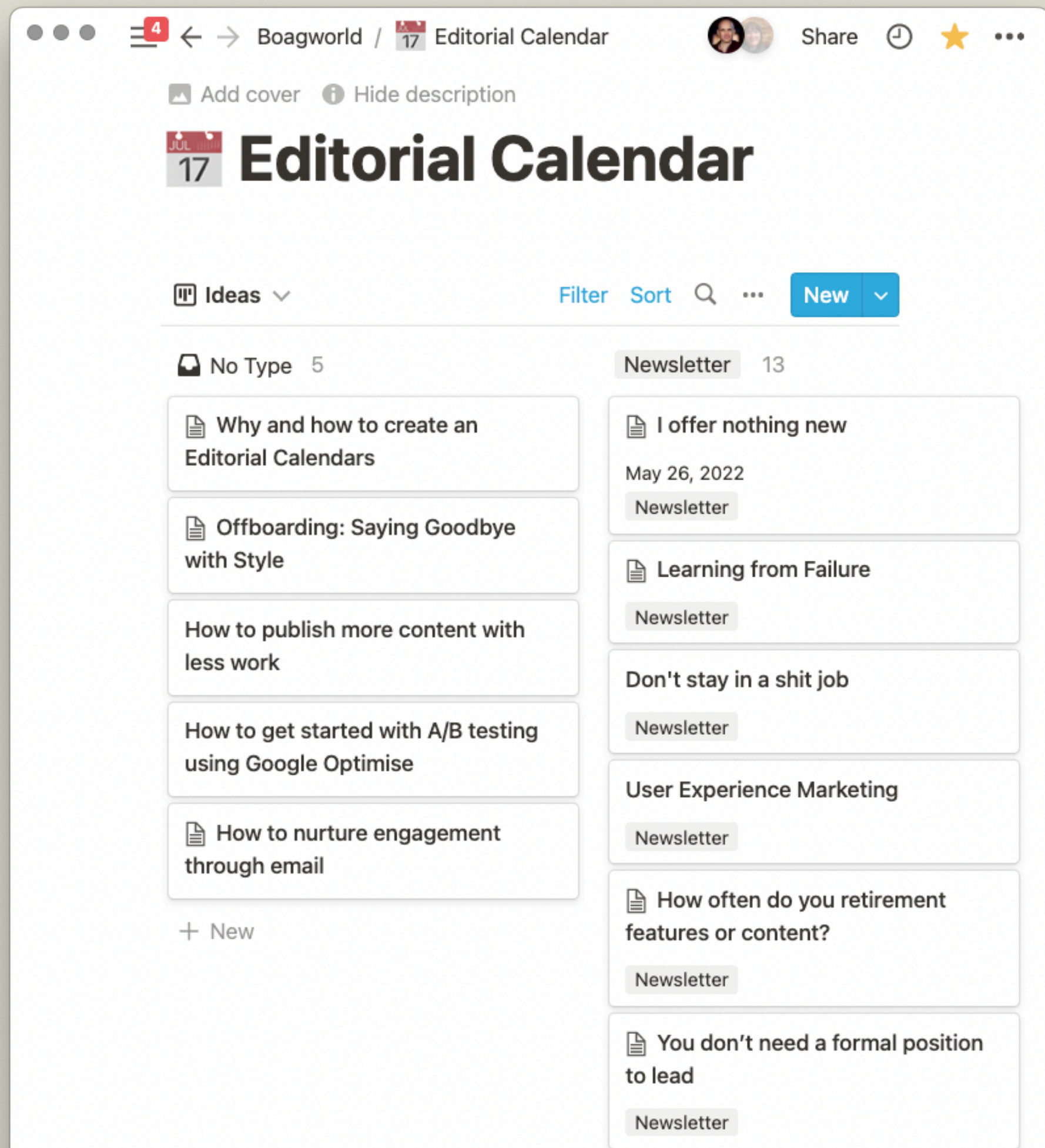


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- Consider the work you are doing.
- Write around services you offer.
- Talk about the value of what you want to offer.
- Pay attention to what annoys you.
- Keep an eye out for good examples.
- Research what people are googling.

So many ways to approach a subject

- Reviews.
- Questions.
- How to.
- Industry News.
- Controversial Subjects.
- Checklists and Cheatsheets.
- Lists.
- Case Studies.
- Interviews.
- Resources.
- Problem and Solutions.
- Parodies and Humour.
- Surveys and Polls.
- Event Summaries.
- Think Out Loud.
- Rants.
- Beginner's Guides.
- Statistics.
- Apps and Tools.
- Guest Writers.
- Debates.
- Myth vs. Fact.
- Personal Experiences.

Avoid starting with a black page



Start keeping a list of possible ideas in something like Notion, Google docs, or Evernote.

Every time you have an idea, add it to the list along with a few bullets to help you get started.

Once in a while, sit down and brainstorm a load of ideas to keep your list topped up.

Finding your voice.

Personality is how we win business

When we write online, we think we have to appear professional. That makes us dull.

Your personality is the one thing that your competitors cannot replicate. Of course, not everybody will like it, but enough people will sustain your business.

If people like you, then they will listen to you. If they listen to you, they will come to trust you. If they trust you, they will buy.

Be more of who you are

You cannot be anybody else. Don't try.

Instead, exaggerate who you are and make it more obvious.

For example, I am enthusiastic and passionate. I get excited. You might be considered and thoughtful. No personality type is wrong.

You don't need to appeal to everybody. The internet is a big place with a lot of potential clients.

**Have opinions.
Don't just
recycle the
thoughts of
others**

**Write and share your personal
manifesto.**

— What do you care about?

I care about accessibility

— What annoys you?

Dark patterns infuriate me.

— What do you believe?

I believe that what is good for the user is
good for the business.

Growing your list

Your subscribers are the best way to grow your reach

We want to encourage our subscribers to recommend the list to others and even feel able to recommend your services despite not having worked with you personally.

Turn users to advocates

Connecting with users

- Ask questions.
- Run surveys.
- Start debates.
- Ask for help.
- Do meetups.
- Connect them to one another.

Show appreciation

- Say thank you!
- Do giveaways.
- Do random acts of kindness.
- Ask how you can do better.

Encourage referrals

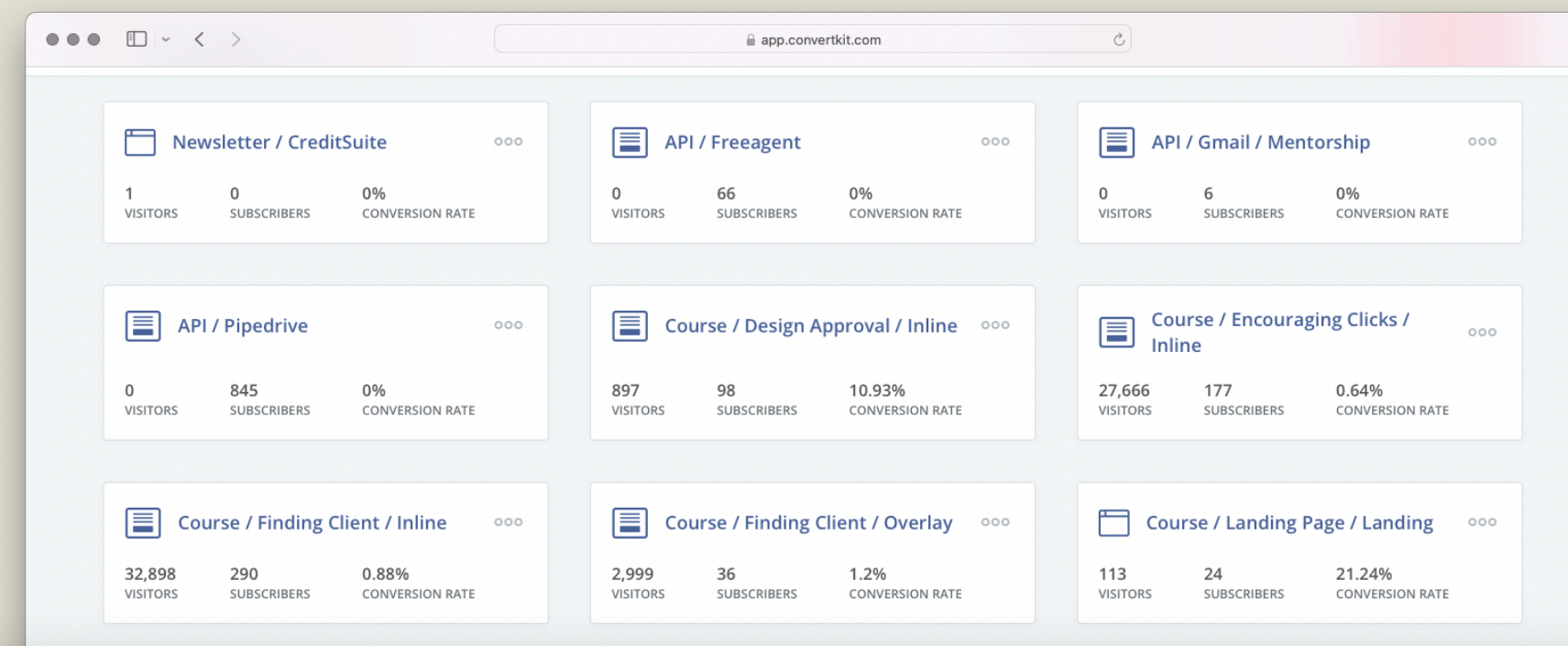
- Make newsletter sharing easy.
- Offer commission.
- Give them something in return.
- Ask politely!
- Ask why they don't.

Other ways to grow your list

- SEO orientated blogging.
- More cold emailing.
- LinkedIn or Google Ads.
- Webinars.
- Social media.
- Guest posts.
- Speaking.
- Community engagement.
- A new sector.
- Podcast guest.
- Going generic.

Don't abandon a sector too soon.

Monitor what works



The screenshot shows the ConvertKit editor for a newsletter titled "Newsletter / Web Summer Camp". The main content area features a dark green background with a book cover image. The text includes the author's name "PAUL BOAG", a headline "Get a free copy of the User Experience Revolution", and a list of benefits for signing up. A central white box contains a personalized greeting "Hello Web Summer Camp Attendees!" and a call to action "SIGN UP TODAY" with input fields for "Your first name" and "Your email address". On the right, a "General styles" sidebar allows for customization of fonts (Merriweather for headings, Lato for body) and colors (white for form and top backgrounds, black for text).

**Making Your List
Appropriate to a
wider audience.**

How to segment your audience

Separate forms

You will probably want separate landing pages if you are targeting different sectors. That means you can tag people depending on which form they used.

Ask them

You can add additional fields asking for more information when users sign up or send them a survey later. You can tag them based on their responses.

Watch them

You can tag people based on their behavior. For example, what web pages they look at, where they come from, or what links they click in your emails.

How to customize based on segmentation

Different onboarding

We have our email course for our first sector, but other sectors could have a variation of this onboarding course. Alternatively, you could create a generic onboarding series based on issues relating to the services you offer.

Email variations

Once people are beyond the onboarding series, we will want all segments to join a single list (to save us work). However, we can tailor our emails based on those segments. That can either be separate emails or just slightly different wording.

app.convertkit.com

Grow Send Automate Earn Learn Boagworks

Newsletter Onboard Content Reports Settings

Subject line
Boagworld: Your New UX Community Edit preview text

Published Send this email Immediately Filter Delete Preview Browser Email

boagworld

`{% if subscriber.first_name != blank %}`
Hello `{{ subscriber.first_name }}`,

`{% else %}`
Hello,

`{% endif %}{% if subscriber.tags contains "Source Smashing" %}`
Thanks for signing up to the Boagworld Mailing List. It means a lot that a Smashing reader like yourself would join my list. I will try my best to deliver the same high standard.

Unlike Smashing, Boagworld is just my personal site and list, however, I honestly believe I can help you as I share my 25 years experience in the industry. If you want to know a bit more about me, you can [learn about my professional life here](#).

`{% else %}`
Welcome to the Boagworld mailing list! It is so great to have you with us.

Can I start by saying I would love to hear from you? I'm not just saying this to be all pretend-friendly, I'd genuinely love it if you want to reply and say hi too. It's lovely getting to know who I'm talking to when writing these newsletters. What do you hope to get from this newsletter, where do you work and what is your role?

Boagworld is just my personal site and list, however, I honestly

Emails

- Boagworld: Your New UX Co...
Immediately
- How to Understand Your Use...
7 days
- How to Improve the Experien...
7 days
- How to Encourage Users to T...
7 days
- How to Perfect Your User Inte...
7 days
- Do You Run Your Own Web D...
7 days
- What is Your Digital Strategy?
7 days
- Do You Have Your Web Gover...
7 days
- It Is Time to Change Your Org...
7 days

Add Email

Get organized

Dedicate regular time to marketing and get better at tracking what works and what doesn't. Experiment and monitor the results.

Be ambitious

Work on bigger projects like books, video courses or workshops. These raise your profile because they have a higher barrier to entry.

Price higher

As you see more work, don't necessarily start hiring more people. Raise your prices instead, which allows you more time for marketing, leading to a virtuous cycle.

Take your marketing to the next level

Growing your audience checklist


- ✓ Set aside regular time to focus on your marketing.
- ✓ Keep a list of possible topics to write about.
- ✓ Don't be afraid to be yourself in your emails.
- ✓ Experiment to find the best ways of adding more people to your list.
- ✓ Create ways for your audience to start talking to one another and sharing.
- ✓ Consider alternative and more ambitious marketing projects.

Questions

Growing your list can be a fun challenge but it takes some practice to get right. If you have questions email: paul@boagworld.com

Turn Leads Into Projects

One of your contacts reaches out with a potential project. This section will give you the tools and techniques to turn them into a paying client.



A different kind of lead

More Interested

The clients who come to you will be interested in working with you in particular.

More Informed

These leads will be better educated about best practice and your way of working.

More Open

Leads will come to you earlier and so be more open to the best approach.

Get organized with your leads.

Because leads will approach you earlier in their process, it may take longer for a deal to be closed. That means you need a system for managing those leads.

You need a CRM

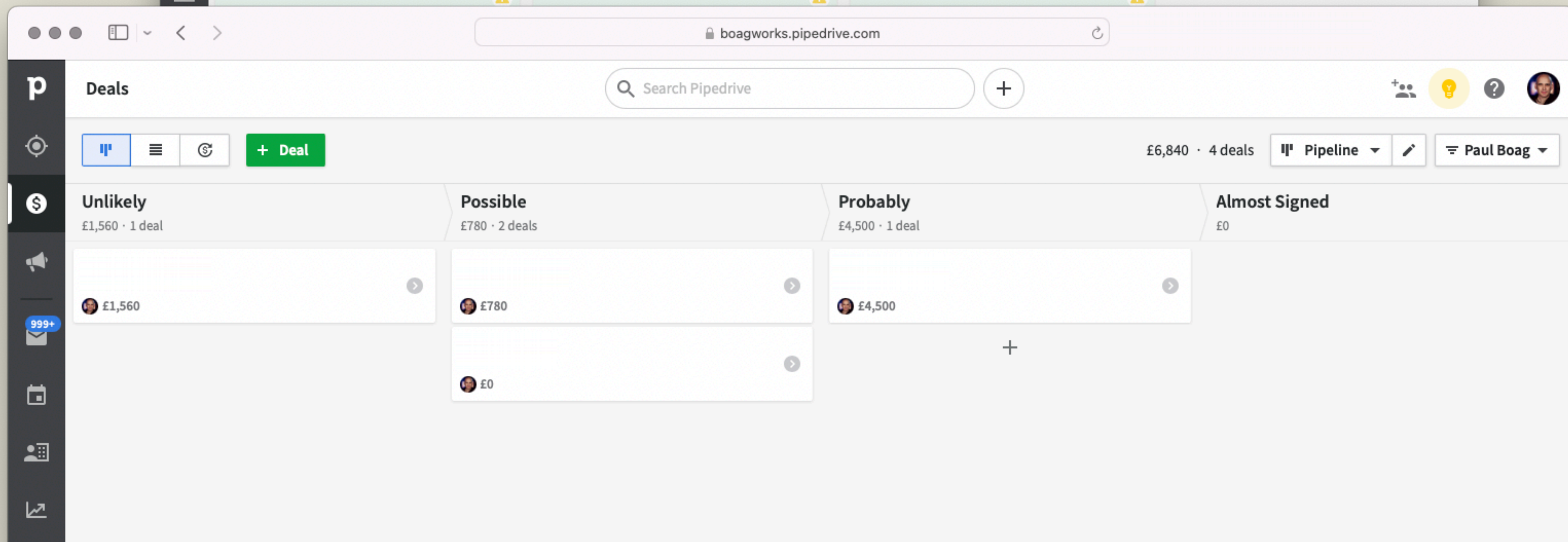
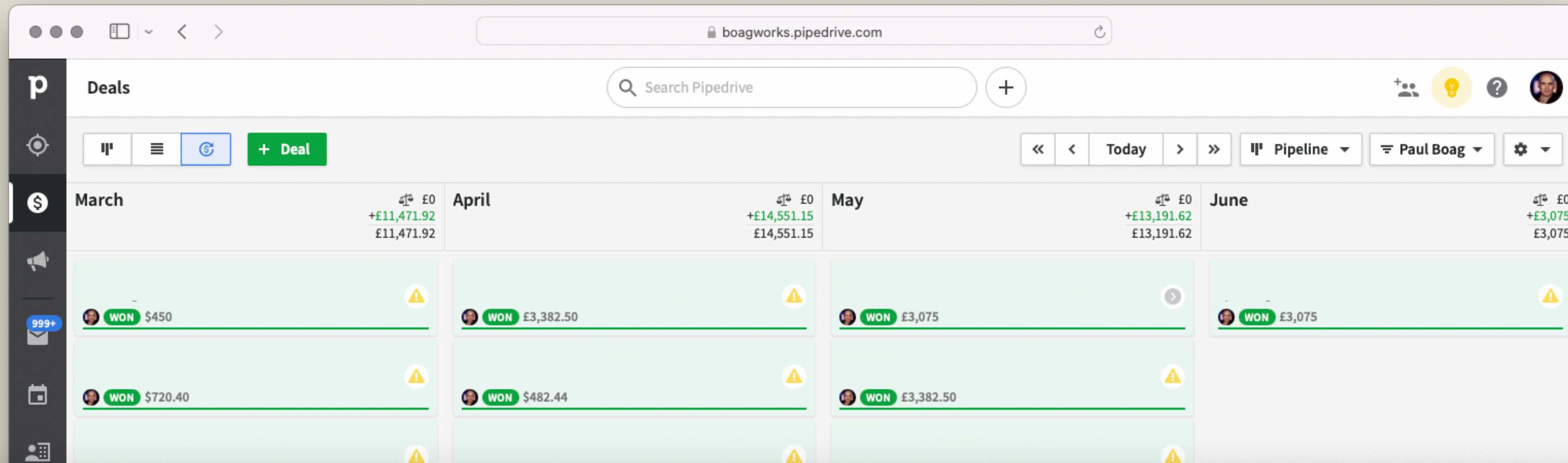
Why?

You need a system to track every conversation you have, even if it is not a request for a proposal — a way to nurture an initial conversation into a full-blown project.

What?

- Create deals tied to individuals in an organization.
- Assign tasks to deals.
- Add notes to deals.
- See all emails relating to a deal.

Try Pipedrive



Using your CRM

Pursue every
lead to
destruction

Add every person who reaches out to you to your CRM, even if it isn't a project.

Followup on every conversation, even if it is just a question.

Followup on every project enquiry to destruction.

Contact in a week, two weeks, four weeks, eight weeks and so on.

Show interest, tell them they can ask you to stop, but don't give up.

How to engage with a new lead

Arrange a call as soon as possible. Speaking to somebody over zoom builds as relationship in a way email cannot.

Understand their challenge and help in anyway you can. Do not hold back advice.

Discuss budget. Ask if the client has budgetary constraints and if not, throw out some numbers to gauge reaction. Have a frank conversation.

Don't be afraid to challenge. If you disagree with their suggestions say so. Be a peer and advisor, not a supplier.

Creating a compelling proposal

In many cases, the proposal will be a formality. The client will have already decided they want to work with you. However, take the proposal seriously as you don't know who else will read it.

What to include in a proposal

Start by explaining the need they have for help. Avoid talking about the company (they already know who they are).



Engagement Evaluation

[Focus on what brought about the need for the product, not the company background.]

Objectives

The objectives for this project according to our mutual agreement are:

[Include four to six objectives. These are desirable outcomes.]



Paul is one of the smartest, most passionate, most generous people I know in the web / online industry. He is

What to include in a proposal

Outline a small number of objectives that the project should deliver. For example, an objective might be an increase in leads.

Boagworks and Contact Company Name

Engagement Evaluation

[Focus on what brought about the need for the product, not the company background.]

Objectives

The objectives for this project according to our mutual agreement are:

[Include four to six objectives. These are desirable outcomes.]

“ Paul is one of the smartest, most passionate, most generous people I know in the web / online industry. He is truly committed to helping organisations become simpler and more customer-centric.

Gerry McGovern, Author of Transform

What to include in a proposal

For each objective have a way to measure whether it has been achieved. That reassures the client and sets you up for more work when you demonstrate success.

“ Paul is one of the smartest, most passionate, most generous people I know in the web / online industry. He is truly committed to helping organisations become simpler and more customer-centric.

Gerry McGovern, Author of Transform

Measures of Success

The metrics by which we will measure our success in achieving the above objectives are:

[There should be one of these, minimally, for each objective to assess progress and your contribution to it.]

“ Medecins San Frontieres, being a decentralised international association, faces challenges in meeting the needs of a diverse global audience. Paul and the team at Headscape have been invaluable in helping us see the potential of digital for doing this. They have helped us recognize the changes needed to engage with our connected audiences, bringing clarity and innovation to our digital strategy.

What to include in a proposal

For each objective, attempt to tie it to a tangible (ideally monetary) return. Doing so will make your price look much more reasonable.

international association, faces challenges in meeting the needs of a diverse global audience. Paul and the team at Headscape have been invaluable in helping us see the potential of digital for doing this. They have helped us recognize the changes needed to engage with our connected audiences, bringing clarity and innovation to our digital strategy.

Nondas Paschos, Medecins San Frontieres

Value to Contact Company Name

The anticipated value of achieving the above objectives for [org] will be:

[Aim to have at least to value statements for each objective, with at least half of these having a monetary value]

Methodology and Options

[Introduction to section]

Option 1: Create and Execute

We will:

...

Option 2: Create, Test and Execute

What to include in a proposal

Always offer the client multiple options.

Ideally, one that is slightly within their budget, one that is slightly more than their budget, and one that ignores their budget but delivers the best value.

Contact Company Name

The anticipated value of achieving the above objectives for [org] will be:

[Aim to have at least to value statements for each objective, with at least half of these having a monetary value]

Methodology and Options

[Introduction to section]

Option 1: Create and Execute

We will:

...

Option 2: Create, Test and Execute

In addition to Option 1, we will:

...

Option 3: Evolve and Advise

In addition to Options 1 and 2, we will:

...

“ Paul is an inspiration. I only wish I'd worked with him

What to include in a proposal

Have a section that outlines the benefits that you, in particular, provide. Define both why you are the right fit and why you might not be.



I am well respected in the field, speaking globally on digital strategy.

I also have extensive contacts with experts in every field of digital, meaning I can help **Contact Company Name** assemble a world-class team of digital specialists to supplement their in-house team if required.

Ultimately, whether you should hire me comes down to your ambitions for digital. If you consider digital the key to your long-term business success, I am probably the right choice. However, if you see it as an important but secondary component, there may be better suppliers.



Logistics

What to include in a proposal

Make sure you also include a section addressing things like timing and the role of both the client and yourself.

consider digital the key to your long-term business success, I am probably the right choice. However, if you see it as an important but secondary component, there may be better suppliers.



Logistics

[Timings and Accountability]

“

Paul is an inspirational leader and a visionary in all things web-related. I particularly like the fact that he is not afraid to speak out and challenge the status quo.

Simon Brookes, University of Portsmouth

What to include in a proposal

Consider using an app like [Qwilr](#) that allows you to create interactive pricing tables and provide electronic signatures.

we bill separately for reasonable travel, lodging, and dining expenses. All other expenses are included.

Option 1: Create and Execute



Description

Price

Item Name

£450.00

Proposal Agreement

If you are happy with this proposal you can choose to click accept and it will become the contract between us.

ACCEPT

+ Show/Hide Terms and Conditions

What about pitching?

You will not have to pitch if you have done things right because the client will know they want you. I have now reached the point where I refuse to participate in pitches.

Turning leads into projects checklist

- ✓ Get yourself a CRM to track every lead that comes in.
- ✓ Pursue every lead to destruction.
- ✓ Arrange a call with a lead as soon as possible.
- ✓ When talking to clients act like an advisor, not a supplier.
- ✓ Ensure your proposals demonstrate value and offer options.

Next steps checklist

- ✓ **Decide who it is you want to work with.**
- ✓ **Create a survey to better understand them and make contact.**
- ✓ **Build a compelling landing page with associated email course to encourage signups.**
- ✓ **Nurture those relationships over time via email.**
- ✓ **Get organized in how you deal with incoming leads.**

Final Questions

Download slides at:
subscribe.boagworld.com/findclients