

THE ESSENTIAL GUIDE TO WRITING A WINNING MARKETING SERVICES CONTRACT




HubSpot

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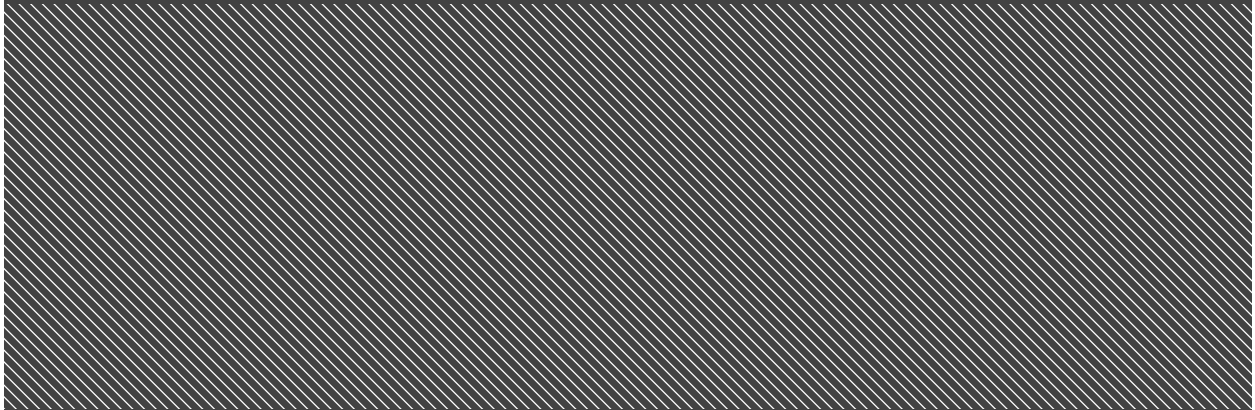
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Introduction

SET YOURSELF UP FOR A WIN WITH A GOALS-ORIENTED SALES PROCESS



INTRODUCTION

HubSpot recommends a goal-oriented sales process to its Agency Partners, mainly because of how it aides in the contract writing process.

Once a prospect is qualified, an agency's focus should shift to uncovering the prospect's business goals and most pressing needs. These goals drive the way the agency proceeds, which of its service offerings it leads with, what expectations to set in terms of timing, and, in turn, what size retainer to recommend.

Building an action plan based on your prospects' goals will position your service offerings as strategic recommendations. Being able to refer back to and report on these goals throughout your engagement will make quantifying your success and advocating for more resources or a longer retainer easy.

Once the sales process is complete, your prospect will likely ask you to send over a proposal.

Your prospect will want a proposal for a couple of reasons. The reasons we see the most often are:

- TO GET IN WRITING WHAT EXACTLY YOU WILL BE DOING FOR THEM AS THEIR NEW AGENCY
- TO FORWARD FOR BUY-IN FROM THEIR MANAGERS
- TO PRICE-SHOP YOU AGAINST OTHER AGENCIES

However, if you used a process similar to what we outlined above, the prospect will be qualified and presold already. Your proposal then becomes a contract request. It sets these agreed-upon goals in writing, and turns them into promises of what your agency will do for the client, and what they in turn, will do for you.

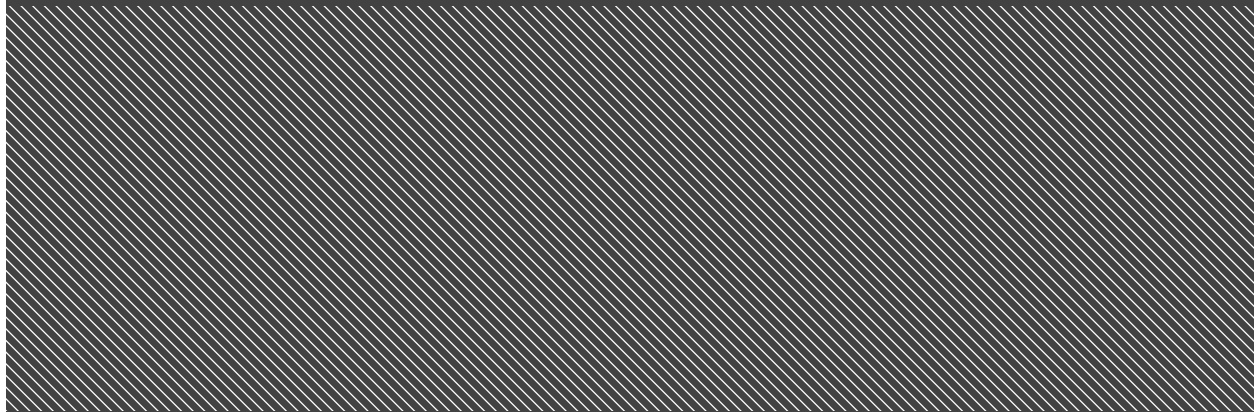
A contract can easily be negotiated and renegotiated, examined and second-guessed, for months and even years. While it is, of course, important for both you and your client to understand the contract going in, and make sure it's fair to everyone, it's in the best interests of both of you to avoid such long delays and sign the agreement quickly.

One of the most important steps you can take to avoid confusion and delays is to take the time to develop a solid contract template, into which you can then plug the necessary details specific to any particular client. The contract will have to be customized to each individual situation, but the basic details of the agreement should remain the same: something that both you and your client want, and will make both of you happy. A contract template is a one-time time commitment, which can then be reused over and over for years to come, allowing you to swiftly create the best agreement possible with each client.

That said, contract writing can be extremely difficult and time-consuming if you do it inefficiently. Don't waste hours reinventing the wheel every time. Use the five tips on the following pages to construct a template. It will help you increase your chances of getting back a signed services contract – and save time.



THE KEYS TO WRITING A WINNING MARKETING SERVICE CONTRACT



1 - STRUCTURING YOUR CONTRACT

The length of all contracts should be 2-3 pages, 5 at the most. No one wants to read War & Peace. And the longer the contract is, the greater the likelihood that the client won't read it, and will end up (unhappily) surprised by some of the terms they've agreed to. While it's true that they have no one to blame but themselves for not reading a contract, they'd much rather blame you, ruining your professional relationship. So keep the contract short, simple, and to the point, in order to avoid such unpleasantness. Follow the minimalist structure below for maximum efficiency.



EXECUTIVE SUMMARY

Create an overview of what's in this contract. Weave a story of the client's current challenges and how your agency is going to help them meet their goals. Avoid highly technical terms, so that anyone at the prospect's company reading the contract can understand what you will be doing. Also remember, this is not a sales pitch. That part is already accomplished. State things matter-of-factly, rather than embellish with a lot of sales talk.

DISCOVERY

This is where you present basic facts about the client and their current needs. If you did an [Inbound Marketing Assessment](#), highlights go here.

SCOPE OF SERVICES

What are you going to do for the client? Spell it out exactly. What's your role? What's their role? It's important to get very technical in this section. Here are some of the things you need to outline:

- Services/Activities, and Time per activity. This is necessary for quoting a retainer.
- ROI and Metrics for Success. Give your client a very specific definition of the results you intend to get for them and how they can be measured, in terms of concrete analytics.
- Time and Retainer Length. How long will this contract last? How much will you be paid for that time? When will you discuss the possibility of renewal? When and under what circumstances can the contract be terminated early, and what will be the consequences?
- Costs. In addition to your fees, what will the expenses be for this project, and how will they be covered? In most cases, the client pays for expenses, but when is that money payable? At the end of the contract, or throughout?

TERMS AND CONDITIONS

These are the rules that both you and your client must agree to, in order for the contract to go forward. What can and can't you do with the client's account, information, brand, etc., and what they can and can't do within the scope of the agreement.

APPENDIX

This section includes any other pertinent information that needs to be laid out for the agreement to go forward.

METHODS OF PAYMENT ACCEPTED

How will they pay their invoices? Check? Credit card? Automatic debit? Make sure everyone is clear on this, so you know what to look for when the money is due.

PLACE TO SIGN

Make sure there's a line for them to sign and one for you. And make sure that each of you keeps a signed hard copy of the contract for your own files, in case you need to refer to it later, and as proof of what you've both agreed to.




2 - MAKE IT VISUAL

Your contract needs to be visually appealing. That means you need to make it perfectly formatted, typo-free and well-designed. If a contract is unformatted, does not contain your company logo or graphics and has poor grammar and typos, why should a prospective buyer trust or pay you \$15,000 to redesign their website?

Additionally, the more visual the contract is, the easier it will be to peruse, and the more likely the client will be to read the whole thing. Much like the content you create, if the contract is just a bunch of long, unbroken paragraphs of text, the reader will be inclined just to skip it and go straight to signing. The difference, though, is that in a blog, this is just a minor inconvenience. In a contract, it spells doom for both parties.

Contracts should have clear, distinct company branding that fits the page, and content should be proofread very carefully (contracts have been lost due to calling a client the wrong name). If you're creating a template in a design program that does not have an obvious/easy spell check (e.g., Photoshop, Illustrator, InDesign), copy and paste all of the text into Microsoft Word just for the spell-check feature.




“If a contract is unformatted, does not contain your company logo or graphics and has poor grammar and typos, why should a prospective buyer trust or pay you \$15,000 to redesign their website?”

3 - RESPOND QUICKLY

Timing is everything. Oftentimes, that's why one provider is chosen over another. The losing provider may even have the lower price. But they were simply too slow in finalizing the deal, so the client went with someone else in the meantime.

Having an easily customizable contract template that you can slightly tweak and edit quickly is an essential time-saver and could be the difference between getting the signature or getting shown the door.



“Make sure timeliness is a value that comes across clearly by being prompt with turnaround time on contract requests and modifications.”

As one client said, “Having the proposal come back faster made me think this agency could redesign my website more quickly.” Everything in the sales process reflects back onto your agency. Therefore, taking a long time preparing and finalizing the contract is a terrible way to begin a professional relationship. Make sure timeliness is a value that comes across clearly by being prompt with turnaround time on contract requests and modifications.



4 - PROVIDE RELEVANT EXAMPLES

Most agencies have their client case studies and testimonials front and center on their website. It's important to tailor these examples to the specific client you're dealing with. For example, a 5-person B2C jewelry company which wants to move into primarily online selling will want to look at different examples than a B2B Fortune 500 technology company. Providing an example that doesn't apply to your client will say to them that you don't care about (or don't have experience with) their particular situation, and will just try to apply a cookie cutter solution to their case. Keeping an internal arsenal of relevant examples (by industry, budget size, geography, B2B or B2C, etc.) can be invaluable in warding off such suspicions.

Suggested characteristics to cover in your examples:

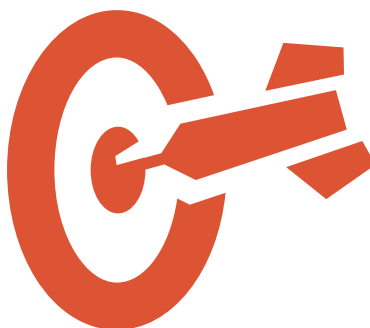
TYPE OF
BUSINESS



SIZE



LOCATION



5 - PROVIDE DIFFERENT PRICING PACKAGES

In the case you have not been able to qualify the prospective buyer fully, provide three different pricing packages. Ideally, you've pre-qualified the prospect via phone and already had a conversation with them, thus the price should not be an unpleasant surprise. If you have not been able to connect with them and still want to send them a contract in writing, provide them several options at different price ranges:

- THE MOST BASIC SET OF SERVICES YOU CAN PROVIDE FOR THE PRICE THEY REQUESTED.
- A “STRETCH” OPTION THAT IS SLIGHTLY ABOVE BUDGET, BUT INCLUDES ADDITIONAL RECOMMENDED SERVICES.
- AN ULTIMATE PACKAGE THAT YOU RECOMMEND, WITH MULTIPLE SERVICES THAT WILL LEAD THEM TO SEE THE BIGGEST ROI FOR THEIR BUDGET

Allow them to check a box next to which option they would like. This is a non-offensive way to upsell without creating frustration due to sticker shock, or coming in at three times their requested budget (at that point, you should have disqualified them earlier than the contract stage as not a good fit for your agency).



CONCLUSION

Contracts are often seen as a necessary evil. Oftentimes, People don't understand them and don't like dealing with them. Those who aren't legal-minded often worry that they're being taken advantage of—that someone will try to sneak in some double-talk legalese that makes the agreement say exactly the opposite of what they think.

As the one providing the contract, it's the job of your agency to assuage these fears and make sure that the process doesn't end up that way. Rather than something to fear, the contract should provide a sense of security. The client should look forward to getting and signing the contract, since it means the beginning of a whole new, brighter chapter in their company, and the start of the professional relationship that will help them write it. If you make sure everything is clear and straightforward, that everyone gets exactly what they want out of the agreement, and that, most importantly, it's taken care of as quickly as possible, you can take the anxiety out of the contract process for everyone involved.●



Want to see an example from a pro?
Check out this proposal example from
HubSpot Partner, PCR. [Check it out here](#)

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Our Inbound Marketing Specialists help hundreds of online services agencies understand how the Five Core service offerings of inbound marketing can help them earn more retainer clients and grow their business. Request a Strategic Consultation to Learn How Inbound can Help your Agency Grow.

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We Look Forward
to Working with You!

