

RETAINER PROPOSAL

[Your Agency] for [Client Name]

Prepared by [Your Name], [Your Agency] · [Date]

How to use this template: replace everything in [brackets] with your own details, delete these grey notes, and you have a complete retainer proposal. Keep it short and specific. Clients respond to clarity, not length.

1. Executive summary

Open warmly and restate what the client wants to achieve, then frame the retainer as the way to get there over time. Keep it about them. A few sentences is plenty.

Thanks for the conversation last week. Over the next [12 months], we will help [Client Name] [achieve specific goal, e.g. grow organic traffic and social presence] through a managed monthly program, so your [marketing] keeps moving forward without you having to run it day to day.

2. Scope and deliverables

Be specific about what the client receives each month. Then name what is out of scope. Listing both prevents scope creep and most "I thought that was included" disputes.

Included each month

- [Service one, e.g. SEO strategy and implementation]
- [Service two, e.g. 4 optimized blog articles]
- [Service three, e.g. 12 social posts across Instagram and LinkedIn]
- [Service four, e.g. monthly performance report and a strategy call]

Out of scope

The following sit outside the monthly retainer and are quoted separately when needed: [e.g. paid ad spend, website development, one-off campaign creative].

3. Term and renewal

State the length, how it renews, and the notice period. It signals you have done this before.

This retainer runs for an initial term of [12 months], then continues month to month. Either party may end it with [30 days] written notice.

4. Investment

Show one-time fees and recurring fees separately, then a combined total. Never make the client do the math. Optional add-ons let the client control the total and give the retainer room to grow.

Item	Type	Amount
[Onboarding / setup project]	One-time	[\$0,000]
[Monthly retainer service]	Monthly	[\$0,000/mo]

[Optional add-on, e.g. paid ad management]	Monthly (optional)	[\$0,000/mo]
Total		[\$0,000 + \$0,000/mo]

Billing: [e.g. the monthly retainer is invoiced on the 1st of each month. The onboarding fee is due on signing.]

Tip: you can also present this as two or three tiers (for example Essential, Growth, and Full-Service) and let the client choose the level that fits their budget. Tiered options often close faster than a single price.

5. Why [Your Agency]

Two or three specific reasons, ideally with a result or a named client. Specific beats generic: name real outcomes, not “we are passionate about results.”

- [A specific, verifiable reason, e.g. “We have grown organic traffic 200%+ for 12 e-commerce brands”]
- [A point of difference, e.g. “You work directly with our senior team, not junior staff”]
- [A relevant credential or named client, e.g. “We run the SEO for [recognizable client]”]

6. Risks and assumptions

A short, honest list of what could affect the work and what you are assuming. It is unusual in a proposal and signals real experience. Keep it to a few lines.

- Assumption: [e.g. we will have timely access to your accounts, brand assets, and approvals]
- Assumption: [e.g. feedback on deliverables is returned within 5 business days]
- Risk: [e.g. results depend on consistent budget and follow-through on our recommendations]

7. Terms and conditions

A binding monthly commitment should include basic terms. The clauses below are a simple starting point. Adapt them to your situation, and have a professional review them before use. This is not legal advice.

Payment. Invoices are payable within [14] days. The monthly retainer is billed in advance each period. Late balances may incur a fee of [1.5%] per month.

Term and notice. After the initial term, either party may end the engagement with [30] days written notice. Work completed up to the end date remains payable.

Ownership. On full payment, final deliverables created for [Client Name] become the client's property. [Your Agency] may show the work in its portfolio unless agreed otherwise.

Confidentiality. Both parties will keep each other's confidential information private and use it only for this engagement.

Results. We commit to the deliverables and effort described above. Specific outcomes such as rankings or revenue depend on factors beyond our control and are not guaranteed.

8. Acceptance

Make saying yes easy. A signature block, or send it through a tool where the client can accept and sign online.

By signing below, both parties agree to the scope, term, and investment set out in this proposal.

[Client Name], [Title]
Date:

[Your Name], [Your Agency]
Date:

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