



# Client-Closing Checklist for Freelance Social Media Marketers

Your step-by-step framework to move from **lead** → **signed client** — without the stress.

**Designed for:** Freelancers / Agency Owners



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Join *MarketersClique* – the community for social media marketers who don't settle.

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# Welcome to your Client-Closing Checklist! This resource is designed to help you:

- Stay organized during discovery and onboarding
- Close clients faster with clarity
- Deliver a premium, professional experience from day one

## Who it's for:

Freelance social media marketers working with small businesses, startups, or personal brands.

## How to use it:

Follow this checklist every time a new lead shows interest. It's built to help you move smoothly from first message to contract.



## About MarketersClique

MarketersClique is a niche community built just for social media marketers like you.

### Inside the community:

- ✓ Get feedback on your proposals
- ✓ Find job leads and partnerships
- ✓ Ask questions, share wins, and learn fast
- ✓ Access tools, templates, and expert sessions

**Join 1000+ freelancers, strategists, agency owners, and brand managers.**

 [marketersclique.com](https://marketersclique.com) | @MarketersClique on LinkedIn



**MarketersClique**

# The Client-Closing Checklist

## Stage 1

Discovery & Fit Check ☐ Lead fills out inquiry form or DMs you interest

☐ You review their profile/brand + note red flags or good fit

☐ Respond within 24 hrs (email/DM) professionally

☐ Schedule 15–30 min discovery call (Zoom/Google Meet)

☐ Ask qualifying questions (budget, goals, past work, timeline)

☐ Decide: Move forward or refer out?

## Stage 2

Pre-Proposal Prep ☐ Review discovery notes

☐ Choose package options based on client goals

☐ Customize proposal template (services, timeline, pricing)

☐ Include a brief about your process (make it visual if possible)

☐ Add testimonial (if available)

☐ Link to FAQ or past work



# The Client-Closing Checklist

## Stage 3

Proposal & Follow-up [ ] Send proposal via Notion, PDF, or proposal tool (like Bonsai, Indy)

[ ] Include next step: "Reply with questions" or "Let's hop on a call to review"

[ ] Follow up in 48–72 hrs (email/DM)

[ ] Offer to explain proposal live if needed

[ ] Ask for decision timeline politely

## Stage 4

Closing & Onboarding [ ] Receive confirmation to proceed

[ ] Send formal contract (use tools like HelloSign, Bonsai, or Canva PDF)

[ ] Send invoice (upfront % or full) via Stripe, Razorpay, etc.

[ ] Send onboarding form/questionnaire

[ ] Schedule kickoff call + client welcome pack (PDF or Notion doc)

[ ] Move project to task board (Trello/Notion/ClickUp)



# The Client-Closing Checklist

## Stage 5

Bonus – Community Support [ ] Share a win with the MarketersClique community

[ ] Get feedback from other freelancers on pricing or process

[ ] Grab 3 bonus templates inside the Freelancer Resource Hub (members-only)





# Want Help Closing Your Next Client Faster?

**MarketersClique gives you:**

- Templates, guides, and checklists like this
- A support system of 1000+ other social media marketers
- Weekly opportunities, job leads, and feedback loops

**Join the Clique**

Let's grow your freelance journey, together.



## **Ready to Learn from 1000+** Social Media Marketers Like You?

- Join discussions
- Access bonus templates
- Get peer support
- Join discussions
- Stay ahead in trends

**Join MarketersClique Now**

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