

Marketing Retainer Proposal

A monthly-retainer proposal structure for \$3K–\$25K/mo engagements. Designed to set clear KPIs and minimize scope creep.

1. The Engagement

[Client Name] is engaging [Your Agency] for a [3 / 6 / 12]-month marketing retainer beginning [start date]. The retainer covers [primary channels — paid social, SEO, content, email, etc.] and is structured to deliver [primary outcome — qualified leads, MRR growth, brand awareness, etc.].

2. Monthly Scope

Each month includes:

- Strategy: 1× monthly planning session, 1× weekly stand-up
- Execution: [X] paid social campaigns, [Y] blog posts, [Z] email sequences
- Reporting: Weekly Slack summary + monthly performance dashboard
- Tools provided: [list of platforms — Notion workspace, Looker dashboard, etc.]

3. KPIs & Success Metrics

We commit to these targets within the first 90 days:

- [Metric 1: e.g., reduce CAC by 20%]
- [Metric 2: e.g., grow qualified pipeline by \$X/month]
- [Metric 3: e.g., increase email click-through to 3.5%]

Performance below target for 2 consecutive months triggers a strategy review.

4. Roles & Responsibilities

Your Agency: Strategy, execution, reporting, recommendations.

[Client]: Single point of contact, asset approvals within 48h, brand assets, access to required platforms (ads accounts, CMS, email tool).

5. Investment

[\$8,500] / month, billed on the 1st of each month.

Initial term: [3 months minimum]. Auto-renews monthly thereafter unless cancelled with 30 days' notice.

6. Out of Scope

Items not included in the monthly retainer (quoted separately):

- Major website redesigns
- Video production beyond [X] minutes/month
- Influencer partnership negotiation
- Paid media budget (you fund directly)

7. Termination

Either party may terminate with 30 days' written notice after the initial term. We hand over all assets, account access, and a transition document within 14 days of termination.

Tip from Auxo: Retainer proposals that include a specific KPI commitment (Section 3) close at 47% — versus 28% for proposals that promise generic 'growth.' Be specific. The fear of accountability you feel writing the KPIs is exactly why prospects sign.