# THE SMART START

AI Prompts for Proposals, Contracts, & Spotting Red Flags

BY May Prime

# DISCLAIMER

Disclaimer The information provided in this e-book is for educational and informational purposes only. The content, including all AI prompts, examples, and guides, is not intended as, and shall not be understood or construed as, legal, financial, or other professional advice. The author and MAY PRIME are not attorneys, financial advisors, or other licensed professionals. The use of any information or prompts in this guide is solely at your own risk. MAY PRIME specifically disclaims any liability, loss, or risk, personal or otherwise, that is incurred as a consequence, directly or indirectly, of the use and application of any of the contents of this book. No warranties of any kind, express or implied, are made. Before making any business or legal decisions, you should consult with a licensed professional.

# TABLE OF CONTENTS

MAY PRIME Inc.

# INTRODUCTION: THE "NEW CLIENT" JITTERS

You did it. You used your portfolio, attracted a lead, and you have an interested client in your inbox. Now what?

For most freelancers, this is the most stressful part. You're worried about what to say, how much to charge, and how to avoid being scammed by a "red flag" client. This anxiety can make you seem unprofessional or, even worse, cause you to undercharge for your work.

This guide is designed to eliminate that anxiety. It's a complete toolkit of prompts to create a simple, professional, and *repeatable* system for onboarding new clients.

## Why a Good Client *Wants* a Good Process

Remember this: A professional process doesn't scare good clients away—it attracts them. When you send a clear proposal, have a simple contract, and communicate effectively, you signal that you are a serious professional, not just a hobbyist. This guide will show you how to look like a 10-year veteran, even if this is your first client.

## An Important Reminder: This Is Not Legal Advice

The prompts in this e-book are for educational purposes only. They are designed to help you organize your thoughts and ask smart questions. They are **not** a substitute for legal advice from a licensed attorney. Always consult a professional for your specific business and contract needs.

# CHAPTER 1: THE FIRST FILTER

## Spotting "Red Flags"

---

Before you write a single proposal or spend an hour on a call, you must learn to filter your leads. A bad client will cost you more in time, stress, and lost income than any good client is worth. The Reddit posts you found are full of freelancers who learned this lesson too late.
Your first goal is not to win the client; it's to decide if the client is *worth* winning. Trust your gut.

The Freelancer's "Red Flag Checklist"

Review the client's very first message against this list. If you check two or more, proceed with extreme caution.

- [ ] Vague Scope: They can't (or won't) describe what they actually need. They say things like "I just need a website, what's your price?" or "This should be a quick and easy job."
- [ ] "Urgent" Rush: The project is an "emergency" and needs to be done yesterday. This is often a tactic to get you to lower your price and skip a proper contract.
- [ ] "Exposure" as Payment: They suggest you'll get "great exposure" or "lots of future work" as a substitute for real money.
- [ ] Unclear Pay/Budget: They get offended or evasive when you ask about their budget. (Like the Reddit post: "they want me as an independent contractor without discussing hours.")
- [ ] Bad-Mouthing: They spend most of their first email complaining about the last 3 freelancers they hired. (Guess who will be the 4th person they complain about?)
- [ ] No Respect for Process: They try to rush past your process (e.g., "Just send me a price, I don't have time for a call") or are difficult about simple things like time management software.

## AI Prompts to Analyze a Client's First Message

Sometimes, a "red flag" is just a client who is new to hiring freelancers. Other times, it's a real warning. Use this prompt to get an unbiased "second opinion" from your AI assistant.

### Prompt 1: The "Red Flag Analyzer"

"Act as an expert freelancer with 10 years of experience. I just received this message from a potential new client. Read it and tell me what 'red flags' or 'yellow flags' you see. For each flag, explain *why* it's a concern and suggest one question I should ask to get clarity."
[PASTE THE CLIENT'S EMAIL HERE]

## AI Prompts for Your "Vetting" Reply Email

This is your most important email. It's polite, professional, and designed to make the client clarify the exact things you're worried about (scope, budget, timeline).
A good client will answer these questions. A bad client will get annoyed and disappear. Either way, you win.

### Prompt 2: The "Clarity & Budget" Email

"Act as a professional [YOUR SERVICE, e.g., 'freelance graphic designer']. Write a polite and enthusiastic reply to a potential new client. The email must do three things:1. Thank them for their interest.2. Ask 3-4 specific questions to clarify the [SCOPE, e.g., 'design needs, number of pages, etc.']3. Politely ask about their budget, for example: 'To help me propose the best solution, do you have an approximate budget range in mind for this project (e.g., $1000-$2000, $2000-$4000)?'4. Propose a short '15-minute discovery call' as the next step."

# CHAPTER 2: THE RIGHT TOOL FOR THE JOB

## Proposal vs. "Kickoff" Email

One of the most common questions from new freelancers (like in the Reddit post you found) is, "Do I need to send a huge proposal for a small job?"
The answer is **no.**
Using a 10-page proposal for a 2-hour job makes you look bureaucratic and slow. Using a 2-sentence email for a $10,000 project makes you look amateurish. The secret is to match the tool to the job.

### When to Use a Full Proposal

Use a formal proposal (which we'll build in Chapter 3) ONLY for big projects.

- The project is complex (many moving parts or phases).
- The project is high-value (e.g., over $1,000, or whatever your "big project" number is).
- The client is a corporation or has multiple decision-makers.
- The project timeline is longer than one month.

### When to Use a Simple "Kickoff" Email

This is your fast, simple, and professional alternative for 90% of small-to-medium jobs.

- The project is simple and well-defined (e.g., "Write one blog post," "Design three social media ads").
- The client is a recurring client you've worked with before.
- The project is a fast turnaround.
- The project is a flat, fixed fee.

This "Kickoff Email" is a mini-contract. It confirms all the details in writing so there are no surprises.

## AI Prompts for a Simple "Project Kickoff" Email

This is your "proposal-killer" for small jobs. It's a single email that confirms everything, looks professional, and gets you paid faster. It serves as a simple agreement that you can both refer back to.
Just fill in the brackets, send it, and once they reply "Yes, this looks great," you are safe to start working.

### Prompt 1: The "Small Job" Kickoff Agreement

"Act as a highly professional freelancer. I need to send a 'Project Kickoff' email to my client, [Client's Name], to confirm the details of a small project we discussed.
Write a clear, friendly, and professional email that includes these 5 sections:1. **Summary:** A one-sentence thank you and confirmation we are moving forward.2. **Scope of Work:** A bulleted list of the *exact* deliverables. The deliverables are: [List your deliverables, e.t., 'One 1,500-word blog post,' '3 rounds of revisions,' 'SEO optimization'].3. **Timeline:** The agreed-upon delivery date. The date is: [Your Deadline, e.g., 'Friday, Nov 10th'].4. **Fees & Payment:** The total project fee and payment terms. The fee is [Total Price, e.g., '$500'] and the terms are [Your Terms, e.g., '100% upfront' or '50% upfront, 50% on delivery'].5. **Next Steps:** A final line asking them to reply 'Approved' so you can send the invoice and start working. e.g., 'Please reply with "Approved" and I will send over the invoice to get us started!"

# CHAPTER 3: HOW TO WRITE A WINNING PROPOSAL

It's Not a Price List; It's a "Value" Document

When you're pitching a large, complex project, the client isn't just buying your time—they are buying a *business outcome*.
A bad proposal is just a price list. It forces the client to compare you on price alone, and the cheapest freelancer always wins.
A *winning* proposal is a value document. It re-states the client's problem, shows you have a clear plan to solve it, and frames your price as an *investment* in their success. This is how you win high-ticket projects, even if you cost more than the competition.

## The 5 Parts of a Proposal That Closes the Deal

The 5 Parts of a Proposal That Closes the Deal

Don't overcomplicate it. A winning proposal just needs to answer these five questions in this exact order. We will use AI to help write each one.
1. **The Problem:** Do you understand my problem? [Shows empathy]
2. The Solution: What is your high-level plan to solve it? [Shows strategy]
3. **The Scope [Deliverables]:** What *exactly* am I getting? [Builds clarity]
4. **The Timeline:** When will it be done? [Manages expectations]
5. **The Investment:** What does it cost? [Frames the price]

## AI Prompts: Defining "The Problem"

This is your proposal's introduction. Start by restating the client's problem and goals *in their own words*. This builds immediate trust and shows you were listening.

### Prompt 1: The "Problem Summary"

"Act as a freelance [YOUR SERVICE, e.g., 'web developer']. I just had a discovery call with a client, [Client's Name]. Their main problem is [CLIENT'S PAIN, e.g., 'their website is old and doesn't work on mobile, so they are losing sales']. Their main goal is [CLIENT'S GOAL, e.g., 'to launch a new, modern e-commerce site before the holidays']. Write a 2-paragraph 'Project Background' or 'The Problem' section for my proposal that summarizes their problem and their goal, showing I understand their needs."

## AI Prompts: Pitching "The Solution"

Now that you've set up the problem, this is your high-level, confident solution. It's the "30,000-foot view" of your plan.

### Prompt 2: The "Solution Statement"

"Following the 'Problem Summary' I just generated, write a short, confident 'Recommended Solution' section. This section should propose my [YOUR SERVICE, e.g., 'Custom Shopify Website Development'] as the perfect solution to achieve their [CLIENT'S GOAL]. Frame it as a strategic partnership, not just a service."

## AI Prompts for Defining the "Scope of Work"

This is the most critical section for protecting yourself. You must be crystal clear about what is included and, more importantly, what is *not* included. A clear scope is the foundation of a happy client relationship.

### Prompt 1: The "Deliverables List"

"Act as a project manager. I need to create a 'Scope of Work' section for my proposal. The project is [PROJECT NAME, e.g., 'a new e-commerce website']. List all the key deliverables as a clear bulleted list. The deliverables are: [LIST YOUR DELIVERABLES, e.g., '5-page website design, mobile optimization, product page setup, checkout integration, 3 rounds of revisions']."

### Prompt 2: The "What's NOT Included" Prompt

"To prevent scope creep, I need to add an 'Exclusions' or 'Out of Scope' subsection. Following the deliverables list I just generated, write a short, polite subsection that lists common things that are *not* included, such as [EXCLUSION 1, e.g., 'logo design'], [EXCLUSION 2, e.g., 'copywriting for blog posts'], and [EXCLUSION 3, e.g., 'website maintenance after launch']."

## AI Prompts for Writing the "Value & ROI" Section

You must do this *before* you show the price. This section connects your fee to a tangible business result. It reframes "cost" as "investment."

### Prompt 3: The "Return on Investment (ROI)" Prompt

"Act as a business strategist. My client's main goal is [CLIENT'S GOAL, e.g., 'to increase online sales']. My service is [YOUR SERVICE, e.g., 'a new e-commerce website']. Write a short 'Value & Investment' paragraph that explains how investing in this project will help them achieve their goal and generate a positive ROI. Focus on benefits like 'increased conversions,' 'stronger brand trust,' and 'saving time.'"

## AI Prompts for Presenting Your Timeline & Price

You've established the value. Now, be simple and direct. Don't use vague "estimates." State your price as a flat "Project Investment." This sounds more professional than a "Cost" or "Fee."

### Prompt 1: The "Project Timeline"

"Act as a project manager. I need to create a 'Project Timeline' section for my proposal. The project is [PROJECT NAME, e.g., 'a new e-commerce website'] and it will take [NUMBER] weeks. Write a simple, 3-phase timeline. For example:* **Phase 1: Discovery & Design (Weeks 1-2):** [What you will do]* **Phase 2: Development & Revisions (Weeks 3-4):** [What you will do]* **Phase 3: Final Review & Launch (Week 5):** [What you will do]"

### Prompt 2: The "Investment & Payment" Prompt

"Act as a professional freelancer. I need to write the final 'Project Investment' section of my proposal. The total project fee is [TOTAL PRICE, e.g., '$4,500'].
Write a short section that includes:1. A clear heading: 'Project Investment'2. The total price, stated confidently.3. The payment terms. The terms are: [YOUR TERMS, e.g., 'A 50% deposit ($2,250) is required to begin, with the final 50% ($2,250) due upon project completion before launch.'].4. A 'Next Steps' call to action (e.g., 'To accept this proposal, please sign below and I will send the initial invoice.')"

# CHAPTER 4: THE CONTRACT

## [Don't Be Scared]

A contract is not a tool to "trick" someone. It's a tool for **clarity**.
A good contract is just a written version of a good conversation. It's you and the client writing down everything you've already agreed to so there are no misunderstandings later. It protects *you* [from doing work you aren't paid for] and it protects the *client* [from you disappearing with their money].
Never, ever start a project without a signed agreement. This can be your formal contract or, for small jobs, the "Kickoff Email" from Chapter 2 that the client "Approved."

### What to Look For: The Good, The Bad, and The Ugly

Whether you're using your own contract or the client sends you theirs, it must be clear. This is *not* legal advice, but here are the key things to look for.

**The Good [Must-Haves]:**

- Parties: YASSIR and the client's name.
- Scope: References your proposal or clearly lists the deliverables.
- Payment: The exact price and when it's due [e.g., "50% upfront," "Net 15"].
- Timeline: The delivery dates.
- Termination: How either of you can end the contract professionally if things go wrong.

**The Bad [Yellow Flags - Ask Questions]:**

- Vague Language: "Ongoing support," "Unlimited revisions." These are traps.
- No "Kill Fee": If the client terminates the contract, what happens? You should still be paid for all work completed to date.

**The Ugly [Red Flags - Get Legal Advice]:**

- "Work for Hire": This phrase can mean you sign away all rights to your work, including the right to show it in your portfolio. Be careful.
- "Non-Compete": A clause that says you can't work for any other clients in their industry. This is a massive red flag.

## AI Prompts for Asking "Dumb" Questions About a Contract

There is no such thing as a "dumb" question when it comes to a contract. If you don't understand a clause, you *must* ask for clarification before you sign. This doesn't make you look amateur; it makes you look diligent and professional. [Remember: This is not legal advice. The AI is a tool to help you formulate your question, not a lawyer.]

### Prompt 1: The "Polite Clarification" Email

"Act as a professional freelancer. I'm reviewing a contract from my new client. I'm confused by Section [Section Number, e.g., 5.1] about [The Topic, e.g., 'Intellectual Property Rights'].
Write a short, polite email to the client asking for clarification. My question is: [Your Question, e.g., 'Does this "Work for Hire" clause mean I'm not allowed to show this project in my portfolio after it's public?']
Start by saying 'Thanks for sending this over. Everything looks great, I just have one quick question for clarity...'"

## AI Prompts for Recurring Clients

As the Reddit post asked, you should not send a massive new contract for every small job from a client you already work with. That's slow and annoying. The professional solution is to use a simple "New Project Addendum" or "Statement of Work (SOW)" that references your *original* master contract.

### Prompt 2: The "New Project Addendum"

"Act as a freelancer. I need to create a simple, 1-page 'New Project Addendum' for a recurring client, [Client's Name].
This document needs to state that 'This Addendum is governed by the terms of our original Master Services Agreement dated [Date of Original Contract].'
Then, it just needs to clearly list:1. Project Name: [Name of New Project]2. Scope of Work: [List the new deliverables]3. Timeline: [The new deadline]4. Fees: [The new price and payment terms]5. A signature line for both me and the client."

# CHAPTER 5: THE PROFESSIONAL KICKOFF

## You're Hired. Now What?

---

The project doesn't start when you *start working*. It starts the moment the client pays the deposit. Your actions in this "limbo" period are what separate the amateurs from the pros.
A professional kickoff is not complicated. It's about clear communication. The client should never have to ask, "So... what's next?" You should be the one telling them.

### How to Onboard a Client Smoothly

our onboarding process has two simple goals:1. **Get Paid:** Secure the deposit [or full payment] before you write a single line of code or design a single pixel.2. **Gather Materials:** Get all the files, logins, and information you need from the client *at the beginning* so you don't have to chase them down later.
This "Welcome" email prompt does both at the same time.

### AI Prompts for the "Welcome to the Project" Email

#### Prompt 1: The "Welcome & Onboarding" Email

"Act as a highly organized freelancer. I need to send a 'Welcome to the Project' email to my new client, [Client's Name]. The contract is signed.
Write a friendly and professional email that does 4 things:1. Expresses excitement to be working with them.2. Attaches the first invoice [e.g., 'for the 50% deposit'] and explains it must be paid to officially 'book their spot' and begin the project.3. Asks them to provide all the materials you need [e.g., 'To get started, please send over your brand logo, any login details, and the text for the About Page.'].4. Confirms the project start date and the first milestone [e.g., 'Once the invoice is paid, our official start date is Monday, Nov 10th. You can expect the first design draft by Friday, Nov 14th.']."

## AI Prompts for Sending Your First Invoice

Don't be awkward about asking to be paid. It's a normal, required part of the transaction. The key is to be clear, polite, and direct. Your invoice email should be a simple, professional "wrapper" for the attached invoice.

Most free accounting software (like Wave) or payment processors (like Stripe) can send these for you, but this prompt is perfect for a simple PDF invoice.

### Prompt 1: The "Invoice Attached" Email (for Deposits)

"Act as a professional freelancer. Write a very short, polite, and clear email to my client [Client's Name]. The subject line should be: 'Invoice [Invoice Number] from [YASSIR/MAY PRIME]'
The email should:1. State that the invoice (e.g., 'for the 50% project deposit') is attached.2. List the total amount due [Total Amount] and the due date (e.g., 'Due upon receipt').3. Briefly list the accepted payment methods (e.g., 'Payment can be made via bank transfer (details in the PDF) or credit card via this link: [Link]').4. End with a simple 'Thank you and I'm excited to get started!'"

### Prompt 2: The "Final Payment" Email

"Act as a professional freelancer. I have just completed the project for [Client's Name]. Write a short, polite email to send with the final invoice. The subject should be: 'Final Invoice [Invoice Number] for [Project Name]'
The email should:1. State that the project is complete and the final invoice is attached.2. List the amount due and the due date (e.g., 'Net 15').3. State that [The Final Deliverables, e.g., 'all high-resolution files / the website admin access'] will be transferred immediately upon payment.4. End with a 'Thank you for a great project.'"

# CONCLUSION: FROM "NERVOUS" TO "BOOKED"

Let's go back to that "new client" anxiety. The fear of being scammed, the confusion over what to say, the awkwardness of talking about money—it's all gone.

Why? Because you now have a **system**.

You have a checklist to spot red flags. You have the perfect email for small jobs and a powerful proposal template for big ones. You know what to look for in a contract and exactly how to kick off a project like a seasoned professional.

A great freelance career isn't built on luck. It's built on a foundation of clear, repeatable, professional processes. This guide has given you that foundation.

On the next page, you'll find a simple checklist to use every time a new lead lands in your inbox.

# YOUR NEW CLIENT INTAKE CHECKLIST

Use this checklist *every time* you get a new client lead. Never skip a step.

---

Phase 1: Vetting
- [ ] Analyze Lead: Review the client's first message against the "Red Flag Checklist" (Chapter 1).
- [ ] Send "Vetting" Email: Use the "Clarity & Budget" email prompt (Chapter 1) to ask about scope and budget.

Phase 2: Proposal (Choose One Path)
- [ ] Path A (Small Job): The job is simple. Use the "Project Kickoff" Email prompt (Chapter 2).
- [ ] Path B (Big Job): The job is complex. Build a full proposal (Chapter 3) using the 5-part prompts (Problem, Solution, Scope, Timeline, Investment).

Phase 3: Agreement
- [ ] Get It Signed: Wait for the client to reply "Approved" to your Kickoff Email OR send your formal contract (Chapter 4).
- [ ] Review & Sign: If the client sent their contract, use the "Polite Clarification" prompts (Chapter 4) to ask about any confusing clauses before you sign.

Phase 4: Onboarding
- [ ] Send "Welcome" Email: Use the "Welcome & Onboarding" prompt (Chapter 5) to express excitement and ask for materials.
- [ ] Send First Invoice: Use the "Invoice Attached" prompt (Chapter 5) to send your deposit invoice.
- [ ] Wait. Do not start any creative work until the deposit is paid.

Phase 5: Kickoff
- [ ] Deposit Paid: The deposit has arrived.
- [ ] Start Work: Send a final "Got it, and we're officially underway!" email and begin the project.

# ABOUT THE AUTHOR

Yassir is the founder of MAY PRIME, a resource hub dedicated to helping freelancers work smarter, not harder, by leveraging the power of AI.
After seeing countless talented freelancers get stuck on repetitive tasks, Yassir created this series of e-books to provide the exact, copy-paste solutions needed to automate their work and get back to what they do best.

Master the Entire Client Lifecycle

This guide gave you the system to professionally *start* a client relationship. But what about finding them in the first place, or dealing with them when things get tough?
Check out the other guides in the **Freelance AI Toolkit** to master the entire client lifecycle:

The "No-LinkedIn" Playbook: AI Prompts for Winning Clients Don't know where to find your first client? This guide shows you how to turn your portfolio website into a 24/7 client-acquisition machine.

Difficult Clients, Solved: AI Prompts for Boundaries Tired of "hands-on" clients and scope creep? This e-book is your toolkit for setting boundaries, managing expectations, and even firing bad clients professionally.

ind them all at
MAYPRIME.STORE