



# IT CONSULTING SERVICES PROPOSAL

YOURCOMPANYNAME

DELIVERED ON:  
NOT YET SUBMITTED  
SUBMITTED BY:  
YOURCOMPANY

# OVERVIEW & GOALS

Dear Ms. John,

We all know that people are the foundation of any great organization. You wouldn't be where you are today without committed employees and loyal customers. How can you support your staff, retain customers, increase revenue, grow market share, and remain flexible in a changing corporate landscape? Responsive, secure, and advanced IT infrastructure is the best investment you can make - now and for the future. Keeping up with technological advancements can be overwhelming, and you can't be an expert in everything. You need reliable and trustworthy IT advice, planning, and management services you and your people can depend on. We specialize in:

- o Custom IT solutions that build on your current business and IT infrastructure
- o High-level security structures that protect you and your customers
- o User-focused tools and training that make implementing new systems easy
- o Long-term management of IT systems and infrastructure for clients

Company focuses on your IT so you can focus on your business growth. Our experienced consultants work with you to guide your technology strategies, helping you align them with your business and process strategies. We provide strategic, architectural, operational, and implementation planning for all your IT needs. Sincerely,

John Doe  
CEO, Companyname

# SCOPE & SERVICES



## DISCOVERY AND PLANNING

We'll look at your business strategy, processes, and portfolio to determine which proven and emerging technologies will work best to boost productivity and revenue, meet evolving customer requirements, and ensure the security of your data.



## AUDIT AND ASSESSMENT OF YOUR EXISTING IT ENVIRONMENT

What is your operating efficiency? What is your capacity for growth? Are your security measures up to standard? We'll evaluate your current IT environment and make recommendations for scaling up without breaking the bank.



## CUSTOMIZED IT INFRASTRUCTURE DEVELOPMENT

Now that our strategic advisors have worked with you to pinpoint and prioritize your IT needs, the next step is to identify the systems and applications that will best support your business goals and formulate a smooth plan for implementation.



## IMPLEMENTATION AND ONGOING IT MANAGEMENT

Once we've determined what IT infrastructure, upgrades, and maintenance you need to optimize productivity and business growth, you can trust us to test and roll out your customized IT solutions with minimal disruption. We can also expertly maintain and manage your system - it's a worry-free option that allows you to focus on your business, now and in the future.

# ADDITIONAL RECOMMENDATIONS



## HELPDESK SERVICES

The helpdesk option allows your company to subscribe to our 24-hour live technical support service. Users can access the service via online chat, text message, or phone.



## STAFF TRAINING

Once your new IT environment is established, your staff will receive a combination of live and self-paced web-based training tailored to your company's needs and culture.



## SUPPORT RETAINER

We recommend retaining our services for at least a year after your new IT infrastructure is implemented. We provide monthly analytics reports on how both internal and external clients are using the system, and make recommendations for maximizing your IT resources.

# TIMEFRAME

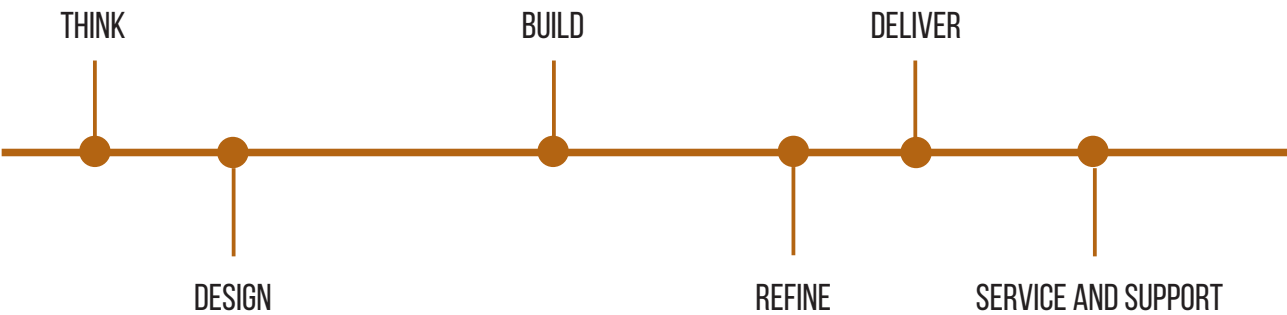
## ACCOUNTABILITIES

Company. provides a team of expert consultants that matches Acme Widgets’ priorities for growth and innovation, and carries out the activities described above within the agreed-upon time frame.

## WIDGETS

Company. provides a team of expert consultants that matches Acme Widgets’ priorities for growth and innovation, and carries out the activities described above within the agreed-upon time frame.

- ASSIGNS A LEADER WITHIN THE ORGANIZATION TO WORK WITH COMPANY
- PROVIDES ACCESS TO SENIOR MANAGEMENT AS NEEDED
- PROVIDES ACCESS TO DOCUMENTS, STATEMENTS, AND COMPUTER SYSTEMS AS NEEDED
- WORKS COLLABORATIVELY IN A SERIES OF WEEKLY MEETINGS TO MOVE THE PROJECT FORWARD



THINK	7 DAYS
DESIGN	7 DAYS
BUILD	14 DAYS
REFINE	1 DAYS
DELIVER	1 DAYS
SERVICE AND SUPPORT	2 YEAR

# YOUR INVESTMENT



Our fees are based on the time required and will be billed at the all-inclusive fixed rate of \$150.00 per hour for the contract period of one year from the date of the contract. Expenses for travel, meals, lodging, printing, and report production are charged as part of the all-inclusive rate above. We are sensitive to the financial challenges facing INDUSTRY and want to minimize fees to the extent possible within the scope of the project.

Company provides the following estimate based on the project summary provided:

ESTIMATE FEE HOURS	50
ESTIMATE FEE PER HOUR	\$ 200.00
ESTIMATE TOTAL FEES	\$ 700.00

Company , bills at the end of each month for fees and expenses incurred during that month. Payment is due within 30 days.

# WHY COMPANY.?



Company, we appreciate the trust you put in us when you hand us the keys to your IT kingdom. We've earned that trust from hundreds of clients in dozens of industries, and we know we can earn it from you.

Our consultants are strategic thinkers with years of experience in both IT and business. We do our homework, and make sure we understand your business goals before working with you to set technology goals.

Our specialty is custom-made solutions for how you work, sell, and grow. We think this is important, because at the end of the day, IT is about people, not computers.

# OUR TEAM



## JOHN DOE, BUSINESS SOLUTIONS ANALYST

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## JOHN DOE, IT SOLUTIONS

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## JOHN DOE, PROGRAMER

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## JOHN DOE, PROGRAMER

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# CASE STUDIES

## CASE STUDY 1: SATISFIED CUSTOMER INC.



### IT PROJECT GOALS

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### OUR SOLUTION

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### MEASURABLE RESULTS

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**“COMPANY. GOT TO KNOW OUR BUSINESS  
AND CAME UP WITH A LONG-TERM IT SOLUTION  
THAT CAN GROW WITH US.”**

- MR. JOHN DOE, PRESIDENT AND CEO



# CASE STUDIES

## CASE STUDY 2: PLEASED AS PUNCH CO.



### IT PROJECT GOALS

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### OUR SOLUTION

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### MEASURABLE RESULTS

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**“I’VE WORKED WITH COMPANY. ON THREE DIFFERENT PROJECTS, AND THEY NEVER DISAPPOINT. THEIR EXPERTISE IS TOP-NOTCH, AND THEY MET OR EXCEEDED EVERY BENCHMARK WE GAVE THEM.”**

- MR. JOHN DOE, PRESIDENT AND CEO

# CONTRACT

NOTE: This is a sample contract. We are not lawyers and recommend you have your own legal counsel review any contracts before sending to your client.

This Consulting Agreement, dated effective \_\_\_\_\_, 201\_\_ (this "Agreement"), is made and entered into by and among \_\_\_\_\_ [name of the company] (the "Company") and [name of consultant] (the "Consultant").

## ARTICLE 1

### SCOPE OF WORK

#### 1.1 SERVICES

The Company has engaged Consultant to provide services in connection with the Company's [summary of the project or business of the Company]. Consultant will [summary of the services Consultant is to provide], and such other services as described in Exhibit A (collectively, the "consulting services").

#### 1.2 TIME AND AVAILABILITY

Consultant will devote \_\_\_\_\_ hours per month in performing the services for the Company as stated herein. Consultant shall have discretion in selecting the dates and times it performs such consulting services throughout the month giving due regard to the needs of the Company's business. If the Company deems it necessary for the Consultant to provide more than \_\_\_\_\_ hours in any month, Consultant is not obligated to undertake such work until the Consultant and Company have agreed on a rate of compensation. [The time devoted can be hours per day, per week, or per year. The Company may also elect to pay a flat monthly fee regardless of hours, but the Company should be cautious of this approach.]

#### 1.3 CONFIDENTIALITY

In order for Consultant to perform the consulting services, it may be necessary for the Company to provide Consultant with Confidential Information (as defined below) regarding the Company's business and products. The Company will rely heavily upon Consultant's integrity and prudent judgment to use this information only in the best interests of the Company.

#### 1.4 STANDARD OF CONDUCT

In rendering consulting services under this Agreement, Consultant shall conform to high professional standards of work and business ethics. Consultant shall not use time, materials, or equipment of the Company without the prior written consent of the Company. In no event shall Consultant take any action or accept any assistance or engage in any activity that would result in any university, governmental body, research institute or other person, entity, or organization acquiring any rights of any nature in the results of work performed by or for the Company.

#### 1.5 OUTSIDE SERVICES

Consultant shall not use the service of any other person, entity, or organization in the performance of Consultant's duties without the prior written consent of an officer of the Company. Should the Company consent to the use by Consultant of the services of any other person, entity, or organization, no information regarding the services to be performed under this Agreement shall be disclosed to that person, entity, or organization until such person, entity, or organization has executed an agreement to protect the confidentiality of the Company's Confidential Information (as defined in Article 5) and the Company's absolute and complete ownership of all right, title, and interest in the work performed under this Agreement.

#### 1.6 REPORTS

Consultant shall periodically provide the Company with written reports of his or her observations and conclusions regarding the consulting services. Upon the termination of this Agreement, Consultant shall, upon the request of Company, prepare a final report of Consultant's activities.

# CONTRACT

## ARTICLE 2

### INDEPENDENT CONTRACTOR

#### 2.1 INDEPENDENT CONTRACTOR

Consultant is an independent contractor and is not an employee, partner, or co-venturer of, or in any other service relationship with, the Company. The manner in which Consultant's services are rendered shall be within Consultant's sole control and discretion. Consultant is not authorized to speak for, represent, or obligate the Company in any manner without the prior express written authorization from an officer of the Company.

#### 2.2 TAXES

Consultant shall be responsible for all taxes arising from compensation and other amounts paid under this Agreement, and shall be responsible for all payroll taxes and fringe benefits of Consultant's employees. Neither federal, nor state, nor local income tax, nor payroll tax of any kind, shall be withheld or paid by the Company on behalf of Consultant or his/her employees. Consultant understands that he/she is responsible to pay, according to law, Consultant's taxes and Consultant shall, when requested by the Company, properly document to the Company that any and all federal and state taxes have been paid.

#### 2.3 BENEFITS

Consultant and Consultant's employees will not be eligible for, and shall not participate in, any employee pension, health, welfare, or other fringe benefit plan of the Company. No workers' compensation insurance shall be obtained by Company covering Consultant or Consultant's employees.

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## ARTICLE 3

### COMPENSATION FOR CONSULTING SERVICES

#### 3.1 COMPENSATION

The Company shall pay to Consultant \$\_\_\_\_\_ per month for services rendered to the Company under this Agreement. The monthly compensation shall be paid on the first of the month following the month the services were provided. The monthly compensation shall be paid regardless of the number of consulting hours provided by Consultant in a particular month. [Another option is to pay hourly and require monthly time documentation. The monthly compensation would be reduced by the hourly rate for the number of hours less than the devoted hours.]

#### 3.2 REIMBURSEMENT

The Company agrees to reimburse Consultant for all actual reasonable and necessary expenditures, which are directly related to the consulting services. These expenditures include, but are not limited to, expenses related to travel (i.e., airfare, hotel, temporary housing, meals, parking, taxis, mileage, etc.), telephone calls, and postal expenditures. Expenses incurred by Consultant will be reimbursed by the Company within 15 days of Consultant's proper written request for reimbursement.

# CONTRACT

## ARTICLE 4

### TERM AND TERMINATION

#### 4.1 TERM

This Agreement shall be effective as of \_\_\_\_\_, 201\_\_, and shall continue in full force and effect for \_\_\_\_ consecutive months. The Company and Consultant may negotiate to extend the term of this Agreement and the terms and conditions under which the relationship shall continue.

#### 4.2 TERMINATION

The Company may terminate this Agreement for "Cause," after giving Consultant written notice of the reason. Cause means: (1) Consultant has breached the provisions of Article 5 or 7 of this Agreement in any respect, or materially breached any other provision of this Agreement and the breach continues for 30 days following receipt of a notice from the Company; (2) Consultant has committed fraud, misappropriation, or embezzlement in connection with the Company's business; (3) Consultant has been convicted of a felony; or (4) Consultant's use of narcotics, liquor, or illicit drugs has a detrimental effect on the performance of his or her employment responsibilities, as determined by the Company.

#### 4.3 RESPONSIBILITY UPON TERMINATION

Any equipment provided by the Company to the Consultant in connection with or furtherance of Consultant's services under this Agreement, including, but not limited to, computers, laptops, and personal management tools, shall, immediately upon the termination of this Agreement, be returned to the Company.

#### 4.4 SURVIVAL

The provisions of Articles 5, 6, 7, and 8 of this Agreement shall survive the termination of this Agreement and remain in full force and effect thereafter.

# CONTRACT

## ARTICLE 5

### CONFIDENTIAL INFORMATION

#### 5.1 OBLIGATION OF CONFIDENTIALITY

In performing consulting services under this Agreement, Consultant may be exposed to and will be required to use certain "Confidential Information" (as hereinafter defined) of the Company. Consultant agrees that Consultant will not and Consultant's employees, agents, or representatives will not use, directly or indirectly, such Confidential Information for the benefit of any person, entity, or organization other than the Company, or disclose such Confidential Information without the written authorization of the President of the Company, either during or after the term of this Agreement, for as long as such information retains the characteristics of Confidential Information.

#### 5.2 DEFINITION

Definition. "Confidential Information" means information not generally known and proprietary to the Company or to a third party for whom the Company is performing work, including, without limitation, information concerning any patents or trade secrets, confidential or secret designs, processes, formulae, source codes, plans, devices or material, research and development, proprietary software, analysis, techniques, materials, or designs (whether or not patented or patentable), directly or indirectly useful in any aspect of the business of the Company, any vendor names, customer and supplier lists, databases, management systems and sales and marketing plans of the Company, any confidential secret development or research work of the Company, or any other confidential information or proprietary aspects of the business of the Company. All information which Consultant acquires or becomes acquainted with during the period of this Agreement, whether developed by Consultant or by others, which Consultant has a reasonable basis to believe to be Confidential Information, or which is treated by the Company as being Confidential Information, shall be presumed to be Confidential Information.

#### 5.3 PROPERTY OF THE COMPANY

Consultant agrees that all plans, manuals, and specific materials developed by the Consultant on behalf of the Company in connection with services rendered under this Agreement, are and shall remain the exclusive property of the Company. Promptly upon the expiration or termination of this Agreement, or upon the request of the Company, Consultant shall return to the Company all documents and tangible items, including samples, provided to Consultant or created by Consultant for use in connection with services to be rendered hereunder, including, without limitation, all Confidential Information, together with all copies and abstracts thereof.

## ARTICLE 6

### RIGHTS AND DATA

All drawings, models, designs, formulas, methods, documents, and tangible items prepared for and submitted to the Company by Consultant in connection with the services rendered under this Agreement shall belong exclusively to the Company and shall be deemed to be works made for hire (the "Deliverable Items"). To the extent that any of the Deliverable Items may not, by operation of law, be works made for hire, Consultant hereby assigns to the Company the ownership of copyright or mask work in the Deliverable Items, and the Company shall have the right to obtain and hold in its own name any trademark, copyright, or mask work registration, and any other registrations and similar protection which may be available in the Deliverable Items. Consultant agrees to give the Company or its designees all assistance reasonably required to perfect such rights.

# CONTRACT

## ARTICLE 7

### CONFLICT OF INTEREST AND NON-SOLICITATION

#### 7.1 CONFLICT OF INTEREST

Consultant covenants and agrees not to consult or provide any services in any manner or capacity to a direct competitor of the Company during the duration of this Agreement unless express written authorization to do so is given by the Company's President. A direct competitor of the Company for purposes of this Agreement is defined as any individual, partnership, corporation, and/or other business entity that engages in the business of [define business - substantially similar to what is provided at Section 1.1] within \_\_\_\_ miles of the [facility, headquarters, etc.].

#### 7.2 NON-SOLICITATION

Consultant covenants and agrees that during the term of this Agreement, Consultant will not, directly or indirectly, through an existing corporation, unincorporated business, affiliated party, successor employer, or otherwise, solicit, hire for employment or work with, on a part-time, consulting, advising, or any other basis, other than on behalf of the Company any employee or independent contractor employed by the Company while Consultant is performing services for the Company.

## ARTICLE 8

### RIGHT TO INJUNCTIVE RELIEF

Consultant acknowledges that the terms of Articles 5, 6, and 7 of this Agreement are reasonably necessary to protect the legitimate interests of the Company, are reasonable in scope and duration, and are not unduly restrictive. Consultant further acknowledges that a breach of any of the terms of Articles 5, 6, or 7 of this Agreement will render irreparable harm to the Company, and that a remedy at law for breach of the Agreement is inadequate, and that the Company shall therefore be entitled to seek any and all equitable relief, including, but not limited to, injunctive relief, and to any other remedy that may be available under any applicable law or agreement between the parties. Consultant acknowledges that an award of damages to the Company does not preclude a court from ordering injunctive relief. Both damages and injunctive relief shall be proper modes of relief and are not to be considered as alternative remedies.

## ARTICLE 9

### GENERAL PROVISIONS

#### 9.1 CONSTRUCTION OF TERMS

If any provision of this Agreement is held unenforceable by a court of competent jurisdiction, that provision shall be severed and shall not affect the validity or enforceability of the remaining provisions.

# CONTRACT

## 9.2 GOVERNING LAW

This Agreement shall be governed by and construed in accordance with the internal laws (and not the laws of conflicts) of the State of [governing law].

## 9.3 COMPLETE AGREEMENT

This Agreement constitutes the complete agreement and sets forth the entire understanding and agreement of the parties as to the subject matter of this Agreement and supersedes all prior discussions and understandings in respect to the subject of this Agreement, whether written or oral.

## 9.4 DISPUTE RESOLUTION

If there is any dispute or controversy between the parties arising out of or relating to this Agreement, the parties agree that such dispute or controversy will be arbitrated in accordance with proceedings under American Arbitration Association rules, and such arbitration will be the exclusive dispute resolution method under this Agreement. The decision and award determined by such arbitration will be final and binding upon both parties. All costs and expenses, including reasonable attorney's fees and expert's fees, of all parties incurred in any dispute that is determined and/or settled by arbitration pursuant to this Agreement will be borne by the party determined to be liable in respect of such dispute; provided, however, that if complete liability is not assessed against only one party, the parties will share the total costs in proportion to their respective amounts of liability so determined. Except where clearly prevented by the area in dispute, both parties agree to continue performing their respective obligations under this Agreement until the dispute is resolved.

## 9.5 MODIFICATION

No modification, termination, or attempted waiver of this Agreement, or any provision thereof, shall be valid unless in writing signed by the party against whom the same is sought to be enforced.

## 9.6 WAIVER OF BREACH

The waiver by a party of a breach of any provision of this Agreement by the other party shall not operate or be construed as a waiver of any other or subsequent breach by the party in breach.

## 9.7 SUCCESSORS AND ASSIGNS

This Agreement may not be assigned by either party without the prior written consent of the other party; provided, however, that the Agreement shall be assignable by the Company without Consultant's consent in the event the Company is acquired by or merged into another corporation or business entity. The benefits and obligations of this Agreement shall be binding upon and inure to the parties hereto, their successors and assigns.

## 9.8 NO CONFLICT

Consultant warrants that Consultant has not previously assumed any obligations inconsistent with those undertaken by Consultant under this Agreement.



# INVOICE

There are many variations of passages of Lorem Ipsum available, but the majority have suffered alteration in some form, by injected humour, or randomised words which don't look even slightly believable. If you are going to use a passage of Lorem Ipsum, you need to be sure there isn't anything embarrassing hidden in the middle of text.

Date: January 01, 20XX

Inv. Number: #1234567

Status : **Pending Acceptance**

Lorem ipsum dolor sit amet.

ITEMS DESCRIPTION	QUANTITY	UNIT PRICE	TOTAL
<b>PROJECT BUSINESS NAME</b> Platea sapien varius. Feugiat egestas Ante nullam elit malesuada. Cras felis malesuada. Id hendrerit velit vel lacinia.	XXXX	\$XXXXXXXX	\$XXXXXXXX
<b>PROJECT BUSINESS NAME</b> Platea sapien varius. Feugiat egestas Ante nullam elit malesuada. Cras felis malesuada. Id hendrerit velit vel lacinia.	XXXX	\$XXXXXXXX	\$XXXXXXXX
<b>PROJECT BUSINESS NAME</b> Platea sapien varius. Feugiat egestas Ante nullam elit malesuada. Cras felis malesuada. Id hendrerit velit vel lacinia.	XXXX	\$XXXXXXXX	\$XXXXXXXX
<b>PROJECT BUSINESS NAME</b> Platea sapien varius. Feugiat egestas Ante nullam elit malesuada. Cras felis malesuada. Id hendrerit velit vel lacinia.	XXXX	\$XXXXXXXX	\$XXXXXXXX
<b>PROJECT BUSINESS NAME</b> Platea sapien varius. Feugiat egestas Ante nullam elit malesuada. Cras felis malesuada. Id hendrerit velit vel lacinia.	XXXX	\$XXXXXXXX	\$XXXXXXXX
TOTAL :			\$XXXXXXXX
TAXES (RESIDENTS ADD 6%) :			\$XXXXXXXX
BALANCE DUE :			\$XXXXXXXX

## THANKS FOR YOUR BUSINESS

\* Thanks for your business! Your invoice total is \$XXXXXX. Make all checks payable to (Company Name). If you have any questions concerning this invoice, please contact (@youremail.com) or +88 123 456 789 customer support.

JONATHAN DOE  
Position | Company Name



# SIGNATURE



1. Please read the contract on the previous page to make sure you understand all the details involved with us working together. It's really important to us that everything is transparent and understood from the beginning so that we lay a solid foundation for a great working relationship.
2. If you have any questions at all, please let us know. We're happy to clarify any points and there may be some items that we can sort out together. We're committed to finding the best way to work together.
3. Once you feel confident about everything and are ready to move forward, please click the 'sign here' button below.
4. Once we receive notification of your acceptance, we'll contact you shortly to sort out next steps and get the project rolling.
5. If you'd like to speak to us by phone, don't hesitate to call 123-4567

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**JONATHAN DOE**

Position | Company Name

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**JONATHAN DOE**

Position | Company Name



## WANT TO WORK WITH US?

COMPANY AND WE REALLY LIKE YOUR WORK, WE ARE! CURRENTLY LOOKING FOR GEEKS  
LIKE YOU FOR OUR NEXT SERVICES, WE ARE. HMM! HERH HERH HERH HERH! I'M ALWAYS  
AVAILABLE. ME YOU CAN REACH BY MAIL

MAY THE FORCE BE WITH YOU, ME

[WWW.YOURCOMPANYWEBSITE.COM](http://WWW.YOURCOMPANYWEBSITE.COM)