

Azure Wallace

Proposal to:

Lisa Mills

Client Proposal for Elephant Friendly Tea

Submitted: October 16, 2018

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1. INTRODUCTION

1.1. PROBLEM STATEMENT

Lisa Mills a program manager for the wildlife conservation program at the University of Montana discussed how as a wildlife researcher and having a passion for elephants began a start up a benefit corporation. The product being sold is elephant-friendly tea meaning that the environment the tea is being harvested is not chemically or physically dangerous to the elephant species.

Lisa Mills seeks for us to organize an online website that is readily available for customers to buy their products, retailers to have the option to buy mass amounts, have information and access to non-profit organization for the elephants (Elephant Origins). She also has a certification with Wildlife Friendly.

Lisa has disclosed that she already has a brand made, she is in the process of having a designed package label and has already been approved by the FDA. The tea is coming directly from the plantation in India to a store front based in Seattle with Lisa's partnered with Inspired Leaf Tea company who has the equipment to make biodegradable and plastic free packaging at a discounted rate. The first expected shipment is 650 Kg of tea to arrive in early December.

2. PROJECT OBJECTIVES AND SCOPE

2.1 PROJECT OBJECTIVE

The objective of this arrangement is for us to help Elephant-Friendly Tea drive economist sales by creating a website that is easily accessible for both consumers and retailers, creating awareness of the organization to consumers and provide access to the non-profit organizations Elephant Origins and Wildlife Friendly.

2.2 PROJECT SCOPE

- **Marketing Brand**

Create marketing brand through social media and news outlets to consumers and retailers about Elephant – Friendly Tea and their mission.

- **Website Creation**

Provide a website that is easily and quickly accessible to both consumers and retailers, impart information about the organizations Elephant Origins and Wildlife Friendly, implement a barrier between consumer shopping and wholesale shopping.

2.3 PROJECT SCOPE EXCLUSIONS

The following areas are specifically excluded from the scope of this arrangement:

Our role will be limited to creating a marketing brand through social media and other news outlets about Elephant – Friendly Tea, create an easily accessible functioning website that provides services for both consumers and retailers. However, we are not responsible for creating feedback from buyers as to promote those committed to the products being made.

3. APPROACH

Our approach to the project will be as follows:

3.1 Market Brand

We will construct a market brand promoting Elephant – Friendly Tea through social media and other news outlets, we will:

- Create social media accounts promoting Elephant – Friendly Tea
- Target women between 24-26 years old
- Provide news outlets the story of Elephant – Friendly Tea and the work they are doing with Wildlife Friendly to ensure the danger to Elephants through tea plantations change.
- Start blog about Elephant – Friendly Tea, the services they provide and how they are helping elephants.

3.2 Website Creation

To create a fully functioning website for your business we will:

- Create a website that is easy to find for the consumers and retailers.
- Provide a tab specific for wholesale use, sign-in page to enter into wholesale prices and deals, newsletter.
- Make individual tea bags and the loose-leaf tea bags quickly accessible to the consumers. (quick buy tab)
- Accurate pricing on the products, differentiated between consumer and wholesale
- Create a payment system with Elephant – Friendly's bank to provide consistent collection and flow of money.
- Construct a system to monitor what and how much consumers and retailers buy.
- Implement a tracking system

- Impart the story of how Elephant – Friendly came to be and what the mission is, certification, who the supporters are (Elephant Origins and Wildlife Friendly), provide links to the websites, upload photos of plantations, biodegradable packaging
- Make a FQ&A, provide answers on where it comes from, packaging materials, what to look out for in the product, how to contact us, product review

3.4 TIMELINE

Task	Time(days)
Social media	2-6
News outlets	6-12
Blog	3-7
Website	20-30
Wholesale tab	3-4
Payment system	7-9
Tracking System	5-8
Access to partner websites	2-3
FQ&A	5-7

4. MAJOR ASSUMPTIONS

During the development of this proposal, we have been guided by certain assumptions about the scope of the project, level of involvement and support from Elephant – Friendly Tea. Major assumptions guiding the proposal are as follows:

- *Scope of Requirements* – This proposal was developed based on the project scope discussed on October 10 meeting. Changes to the scope will impact the project schedule and fees.
- *Personnel* – We will assist in all aspects of the arrangement such as conducting research, creating marketing brand and website as in the scope. We will perform the primary role in completing project activities.
- *Elephant – Friendly Tea* – During the project, we require the support of Elephant – Friendly Tea to accurately portray the information and ensure upmost quality. We may need access to brand logo, pricing information, bank information, etc.

The scope of this proposal covers the Elephant – Friendly Tea project and its policies and procedures. We assume that such policies and procedures is being followed throughout the project.

- *Project Management.* We will assign a project manager to this project who will be responsible for all resources assigned to the project, communicate with Lisa Mills on information when needed.
- *Computer access.* We will have to be able to have access to the website throughout the project.

5. PROJECT STAFFING

The staff that is assigned to this project are devoted to the development and success of this project and meeting the objectives required of Elephant – Friendly Tea. We provide management, associates and partners to conduct the project to our best efficiency.

5.1 Project Team

- **Engagement Partner.** Mr. Smith, Partner in Charge, responsible for overall service to Elephant – Friendly Tea
- **Project Engagement Manager.** Mr. Johnson, Senior Manager, responsible for the overall engagement.
- **Engagement Associate.** Ms. Wallace, Senior Associate, responsible for implementing the project on site in accurately and in a timely manner.
- **Engagement Associate.** Mr. Olsen, Associate, responsible for implementing the project on site accurately and in a timely manner.
- **Engagement Associate.** Mrs. Wilson, Associate, responsible for implementing the project on site accurately and in a timely manner.

Resumes may be found in Appendix B

6. OVERVIEW

6.1 Background

Our firm has continuously been growing in the past 3 years and we are proud to have hired over 100 employees in those 3 years, opening 2 more locations and still growing. We have the chance to help professionals everyday and change the working environment with our consultants.

With more opportunities to grow and compete with the bigger firms we provide a personal relationship with our clients and ensure quality work for our clients.

6.2 Consulting Practice

Our consulting practice provides the best service and takes the necessary time to understand our client's objectives and working with them to provide consistent results. Our consultants are determined to maintain up to date with all technological changes and adjust with the changes as needed to ensure quality.

7. PROFESSIONAL FEES

Our fees are based on actual time and materials used and may vary depending on the skill sets needs. The estimated fees for Elephant – Friendly Tea Website Creation project proposal is as follows:

Planning	\$775.00
Market Brand	\$5,350.00
Website Creation	\$20,250.00
Total:	\$26,437.50

The estimates presented above are based on the approach, scope and deliverables for the engagement described in this proposal. As the engagement progresses, should any of these aspects changed, these estimates may be affected as a result however, we will discuss this matter with you if they arrive.

Based on the fee schedule above, Elephant – Friendly Tea is committing to the project through November 15th for a fee estimated \$25,350.00.

7.2 Out of Pocket Expenses

In addition to the fee's represented above, we are reimbursed for normal out-of-pocket and other expenses associated with this project. Our out-of-pocket expenses are estimated to be 5% of our profession fees.

Invoicing for professional fees and expenses will be biweekly. Invoices are due and payable 30 days after receipt.

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Lisa Mills

APPENDIX A: PROJECT QUALIFICATIONS

Albertsons: major grocery store chain

- Created website design and suggested ways to improve online users.

Wilma: Local events venue in Missoula, MT

- Implemented system where you can buy tickets electronically from the Wilma

APPENDIX B: PROJECT PARTICIPATION RESUMES

AZURE WALLACE

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PROFILE

RELEVANT EXPERIENCE

Famous Dave's – Missoula, MT – Server - 10/15 to Present

- Take accurate food and drink orders by entering order efficiently through a point-of-service (POS) system
- Ensure order is correctly prepared and delivered to customer in a timely manner to guarantee customer satisfaction
- Accurately and quickly calculate customer's checks and collect payment
- Answer questions regarding to the menu and any substitutions that are needed

Party Plus Rentals – Helena, MT – Retail Associate/Laborer - 07/15 to 8/17

Reason for leaving – Returned to school in Missoula

- Mastered POS computer system for automated rental and retail transactions.
- Manage cash register credit card, cash and return transactions ensuring register balance.
- Load and unload rental equipment returned by customers.
- Prepare orders for customer pick-up

EDUCATION

University of Montana

August 2016 – current / Graduation date – Spring of 2020/ GPA 2.65

| INTRO TO CONSULTING | COMPUTER MODELING

Helena High School, Helena, MT

September 2012 – June 2016 – Cumulative GPA 3.57

DRAFT

Elephant - Friendly Tea

Client - Lisa Mills Engagement Partner - Mr. Smith Engagement Manager - Mr. Johnson
10/16/2018

Prepared by: Azure Wallace

Company Data	For Budget	ERP%
Budgeted % Standard	100	
Expenses	5%	
Administration Recovery Rate	5%	

Class	Senior Partner	Senior Manager	Associate	Associate	Associate	Total
Rate Per hour	\$250.00	\$150.00	\$75.00	\$75.00	\$75.00	625
						0
Planning	1	2	1	1	1	\$775.00
Marketing	1	4	20	20	20	\$5,350.00
Website	15	30	50	50	60	\$20,250.00

FEES	Partner	Manager	Associate	Associate	Associate	Total
Budgeted Hours	17	36	71	71	81	276
Budgeted Fees	\$4,250.00	\$5,400.00	\$5,325.00	\$5,325.00	\$6,075.00	\$26,375.00
Percentage of Hours	6.16%	13.04%	25.72%	25.72%	29.35%	1.00
Fees at 100% Standard	\$4,250.00	\$5,400.00	\$5,325.00	\$5,325.00	\$6,075.00	\$26,375.00
Rate per Hour 100%	\$250.00	\$150.00	\$75.00	\$75.00	\$75.00	0
Administration Recovery	\$12.50	\$ 7.50	\$ 3.75	\$ 3.75	\$ 3.75	\$ 31.25
Total Fees	\$4,512.50	\$5,557.50	\$5,403.75	\$5,403.75	\$6,153.75	\$26,406.25
Expenses	\$12.50	\$7.50	\$3.75	\$3.75	3.75	\$31.25
Total Fees and Expenses	\$4,525.00	\$5,565.00	\$5,407.50	\$5,407.50	\$6,157.50	\$26,437.50

