

# IT Consulting Proposal Template

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# IT CONSULTING PROPOSAL



March 10, 2014

**Prepared for:**

[Customer First/Last Name]

[Customer Company]

[Customer Address]

[Customer Phone]

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**Prepared by:**

[Provider Full Name]

[Provider Company]

[Provider Address]



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# Introduction

[Provider Company] (hereafter known as the Provider) is pleased to submit a proposal for [Customer Company] (hereafter known as the Client) to serve as an IT consultant. This proposal describes the IT consultancy engagement as well as services, terms, and schedule for the engagement.

Our IT assessment is the first-step towards implementing real technology changes to your staff, processes, and department as a whole.



## **The benefits of the assessment:**

1. Identify key inefficiencies resulting in wasted time and expenses
2. Identify critical bottlenecks that are limiters to growth
3. View a snapshot of your current technology infrastructure, processes, and staff
4. Identify gaps in industry accepted IT management best practices
5. Provide a clear and actionable roadmap for your IT department based on budget and needs

## **The IT assessment is performed by:**

1. Meeting with you to learn the basics of your business, strategy, and goals
2. Reviewing your existing technology systems and infrastructure
3. Performing interviews with key stakeholders and employees
4. Using best in class industry techniques (Six Sigma, ITIL) to review your business and its operations
5. We provide a detailed Recommendation Report and Executive Presentation tailored to your organization

# About Us



[Provider Company] is a top provider of expert IT Consultant services. We have over [10] years in serving as IT consultants and a long list of satisfied customers. We will be happy to provide additional references upon request.

We know and understand the IT industry and technology, and our mission is to put our expertise to work in your business or organization to provide positive benefits, value, and a great return on your investment in our services.

## Tina Roberts

After several positions in marketing and business management, Tina found that online marketing was the niche for her. With years of experience working with both corporate level and local business clients, Tina is looking to continually extend her SEO & Social Media portfolio to companies looking to grow in the online marketing world.

Education: Bachelors of Business Administration & Economics from ACME College (2007)

**Experience:** Currently works as a Search Engine Optimizer for ABC Digital Marketing, and has worked in the marketing and management field for 6 years.

**Philosophy:** The internet has brought a huge amount of potential for companies of all sizes. However, there are also a lot of companies just trying to push packages. You need a professional who will provide what you need, but will also make sure that you don't spend needlessly on things that you don't need.

## Al Johnson

I deliver eye-catching, sales-bringing, message-passing website designs that effectively meet your needs! The best part of it is that my prices are very reasonable, it's at a good price and excellent quality.

We offer Joomla and Wordpress web design, which are dynamic, database-driven sites managed by the most popular Content Management System on the market. With this

powerful CMS you will be able to log in to an administration interface and manage your site like a pro. You can control publishing, access, layout, forms and a host of other things on your website.

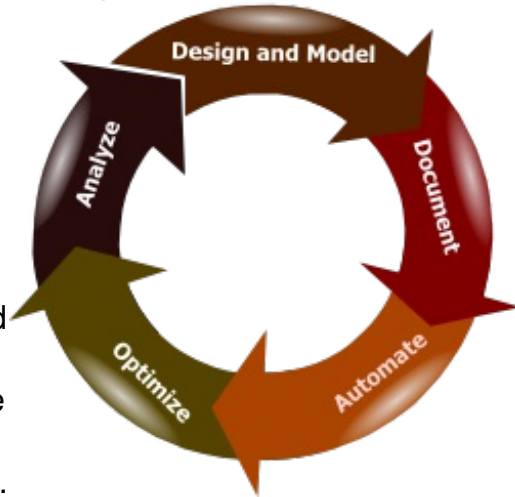
# Consulting Description

The IT consulting engagement will move through several phases. Every organization is unique, including its IT needs, capabilities, and objectives. As a provider, we do not offer canned services; every engagement is custom designed to meet the organization's specific requirements and goals. However, most engagements do follow a similar process that is described below.

## Appraisal and Planning

During this stage, the current state and desired state of IT performance, security, or other areas that are the focus of the engagement are accessed, and a course for moving from the current state to the desired state is determined.

This defines the scope of the consultancy agreement, and clearly defines the responsibility of the Client and responsibility of the Provider during the engagement.



## Objectives and Schedule

Once ultimate goals are determined then intermediate objectives and the timeline for reaching them are established.

## Execution and Metrics

Activities to reach objectives and goals are defined and carried out, including metrics to gauge the success of particular activities in reaching the goal or goals. The consultancy engagement services can involve, but not limited to:

- Developing strategy
- Advising and overseeing activities to improve effectiveness and efficiency
- Present and train industry best practices
- Software planning
- Hardware/ software integration

- Design and development services

## **Review and Closure**

At the end of the engagement term, the success of the engagement will be reviewed and any final sign-off completed. This will include recommendations for future direction for the organization's IT development and improvement.

# Services & Technology

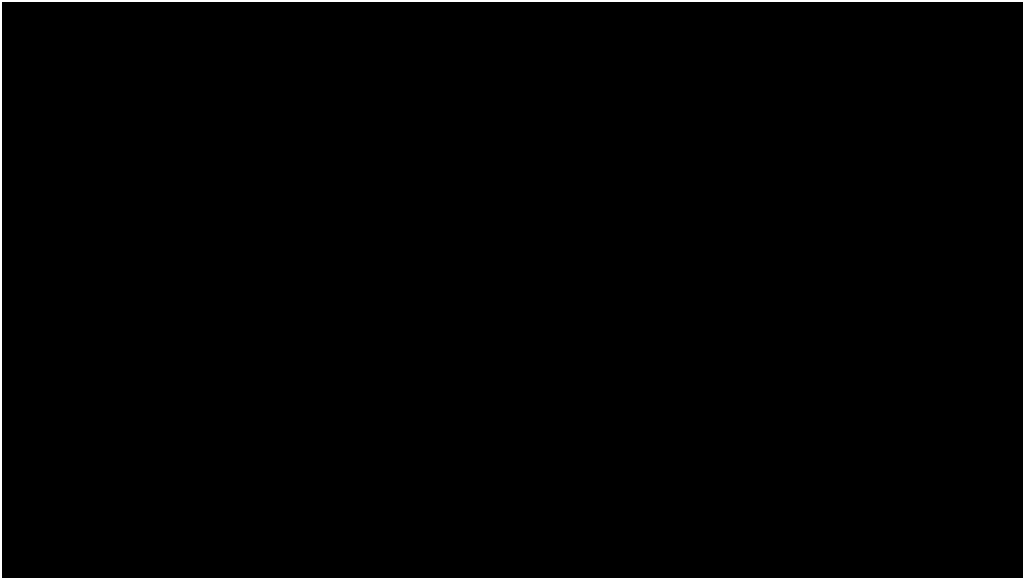


The following section describes the services provided as part of the IT Consultancy:

1. The Provider will assign a lead consultant to oversee the engagement and serve as a single point for engagement communication. The Provider may also assign software developers, system/hardware engineers, and other IT specials as the requirements and needs dictate.
2. Resolve IT issues and make recommendations regarding the IT network, IT security, software/application, hardware, data, and integration as the scope and the goals of the engagement requires to achieve engagement goals.
3. Project work will be split between the Client and Provider facilities, however the Provider project manager will coordinate regular on-site visits on client premises for meetings, evaluations, observations, reviews, testing, and other project purposes as needed.
4. Provider will grant to the Client an unlimited, unrestricted, royalty-free, fully paid nonexclusive license to any software, documentation and information not produced or created by Provider as a result of the performance of work or services under this proposed engagement, however the Provider retains the copyright to above mentioned software, documentation, or information.
5. The Provider may utilize publicly distributed (open source) software for the solutions provided to Client, provided that it is either in the public domain or licensed for public distribution under terms that do not conflict with Client licensing.

## Deliverables & Testing

The Provider will deliver the items determined during the Appraisal and Planning phase of the engagement. The deliverables list will be created and added as an addendum to this proposal or to the Work Agreement created at the acceptance of this proposal.





# Terms & Agreement



The terms for the engagement are defined as follows:

Length: [12 months]

Hourly Rate: [\$75/hour]

Billable Hours per Week [25-35 hours]

Travel Rate [\$35/hour]

The Client will be responsible for any expenses incurred during the execution of the engagement, including travel expenses, per diem, and consumables.

While the Provider may engage other contractors to fulfill specific aspects of the engagement, the Provider retains responsibility for executing the agreement and will not assign or transfer any ultimate rights or obligations to third parties.

The provider will invoice the client Net 15 for the billable hours at the end of every month of the engagement.

## Conclusion

Again, we are happy to present this proposal for your review. Upon acceptance of this proposal, the Provider will draft a comprehensive Statement of Work based of project requirements for your review that will serve as the project contract between the Provider and the Client.

If you have any questions or need additional information amended to the proposal, please let us know. You can reach me directly by phone at [Contact phone] or by email at [contact email].

[Signature]

[Provider Contact/Rep. First/Last Name]

[Contact Title]

[Company Name]