



Dear :

Thank you for the opportunity to present this project plan outlining the costs and responsibilities associated with performing a comprehensive technology readiness review for your business. The purpose of this letter is to set forth the objectives of the proposed engagement and assign responsibilities for their completion.

Background

Our company has developed a comprehensive service to assess your information technology infrastructure and strategies. This assessment presents a clear picture of your short and long-term needs and recommends next steps. A primary focus of this plan is to evaluate your current key business processes and boost innovation, long term value projects, revenue, and cost improvements.

Our process will focus on four key areas; Plan, Lead, Reinvent and Sustain.

PURPOSE AND SCOPE

The purpose of this engagement is to assist your personnel in evaluating your current infrastructure and strategies and present a plan that you can use for implementation. We will provide you with the following services:

1. We will document, evaluate, and assess your current key business processes.
2. We will interview key personnel or external stakeholders to understand their requirements.
3. We will assess the company's adaptability and readiness for change and innovation.
4. We will complete a technology survey and help you to determine technology requirements to position you for long-term sustainability.
5. We will help you to identify critical talent and institutional expertise.
6. We will ensure executive team alignment and commitment and adopt a self-improving culture.
7. We will formalize all results and findings in written reports including a sustainability plan.

CLIENT RESPONSIBILITIES

Our purpose in this engagement is to assist you. You and your personnel will need to fulfill the responsibilities of sharing information throughout the process, which include (but are not limited to) the following:

1. You agree to appoint a company project manager to oversee and coordinate the project. This manager will ensure that agreed upon timelines and due dates are followed and report any delays for unforeseen problems or changing priorities.
2. You agree to provide access to your computing environment including user or administrator rights as needed. You will also make available any appropriate IT resources so that each engagement step can be completed in a timely manner.
3. You agree to complete the tasks as required to produce a timely report. This includes scheduling the time for training and testing, performing the testing and training tasks, and asking questions whenever you are unsure.
4. You will ensure the accuracy of the content information in the system. It is essential that the project include access to all data. In addition, the assessment will also evaluate that the data is complete and accurate and areas where data requirements need improvement.
5. As appropriate for this engagement, we will develop procedures to supplement those in the automated system. You must take the responsibility to follow them on a continuing basis, as documentation is crucial when system failure occurs. All users should exhibit a willingness to ask questions and volunteer suggestions as they relate to the project.
6. You will comply with agreed upon standard for security to ensure all content cannot be accessed by unauthorized or external users unless specifically approved by an administrator or designed user.
7. You understand that our ability to assist and deliver quality support is dependent on our access and permissions in the company's on-premise environment. If we are unable to perform our responsibilities under this agreement where we do not have access in the company's on-premise environment, you agree to arrange a meeting with the IT department to discuss these limitations to find a suitable work around acceptable with the company's policies and procedures.

TIMING AND FEES

Don DeCarlo will assume project manager responsibility for this engagement and will be assisted by other members of our consulting staff as needed. We will begin work on this engagement after we receive a signed engagement letter.

We agree to fix our fee for these services to \$5,000 payable in advance with the signing of this letter.

If we should be required to travel to your location as requested by you this may require out-of-pocket expenses which are billed in addition to the fees incurred. Our payment terms are due on receipt for any invoices that we submit.

While we make every effort to ensure that we recommend the most appropriate software, we cannot be held responsible for information that the manufacturer or vendor does not reveal.

If these terms are acceptable to you, and the services outlined are in accordance with your requirements, please sign below and include the advance payment of \$5,000.

We look forward to the opportunity to provide these services to you. Should you have any questions, please call me at your convenience.

Very truly yours,
DeCarlo Software Inc

Don DeCarlo
Partner

Accepted:
We have read and agree with the arrangements contained in this letter.

By _____ Signature _____

Title _____ Date _____