

[letterhead]  
[date of proposal]  
[Client's Name]  
[Client's Address]

Subject: Proposal for Consultancy Services

Dear [Client's Name],

Thank you for the opportunity to submit a proposal for the Project Health Control (PHC) consultancy service. We appreciate your consideration and are confident in our ability to provide valuable expertise to support your organization's goals.

## **Executive Summary:**

Order Efficiency Ltd is the pioneer of Project Health Control (PHC) methodology that if applied to projects can bring it to early completion and under budget. We can achieve this by keeping visible and transparent the status of project Deliverables while managing Concerns and tracking Actions.

This proposal for implementing the PHC Service on your project outlines what can be expected in our delivery of the service and schedule of monthly costs.

## **Background and Objectives:**

As the business entity that is affected directly by project inefficiencies, the possibility to influence the direction of the project to achieve early finish has obvious benefits in terms of project costs and the achievement of early production. We offer PHC to [Client's Name] as a way to ensure visibility of project progress that includes open access to status of project concerns and actions. The outputs from PHC are intended to allow the project owner a way to raise questions on project progress in full view of all project participants' organizations.

Early project completion is fundamentally not in the interests of any participating organization, except for the owner of the project. PHC Service is a means for the project owner to influence practices that ensure project-wide cooperation on practices leading to early completion. There is a growing list of organizations that are familiar with the PHC methodology and a declared willingness to work with us to make early project completion a mutual objective.

## **Scope of Work:**

The PHC™ service places a dedicated team of people into your project with a tailored mix of remote and on-site presence. This auxiliary workforce comprises Strategists for high-level guidance, Analysts for progress monitoring and roadblock identification, and Administrators for streamlining operations through efficient documentation.

During initial set-up, data structures are established for project-long use and sharing with project staff. A core deliverable is the weekly report tracking deliverables and concerns progress, with a

browser interface for project staff to provide real-time status updates, enabling transparent collaboration and course correction.

As the project progresses with PHC™, staff benefit from deployed Consultants, outputs, meetings, and status reporting, regarding PHC™ systems as a friendly central reference for project status optimization.

Expenditure on PHC™ is arranged weekly, allowing management to evaluate cost against benefits continually. Clients can cancel the contract any time, demonstrating Order Efficiency's commitment to minimal risk of using our Project Assurance services.

The service is provided as a monthly cost based on agreed PHC team hours usage, reconciled against the forecast at contract end, with extensions as the project nears completion.

Specific services are provided not as independently costed activities but are built into the normal day to day service provided by the PHC Service consultants. These specific service are undertaken according to project needs:

- (1) Independent Project Review (IPR)
- (2) Schedule Risk Analysis (SRA)
- (3) Training Needs Analysis (TNA)

## **Methodology and Approach:**

The PHC Service is independent from the project's systems and internal services. It is seen by the entire project staff as a place to lodge complaints and suggestions, ask questions and provide status updates.

In general with the PHC weekly report, the PHC Service stimulates feedback from the project workforce.

The methodology is illustrated in the two video presentations that appear on the 'How it Works' page of the Order Efficiency website:

<https://www.order-efficiency.com>

- (a) PHC Walk Through - Ten-minute video.
- (b) PHC In Action - Twenty-minute video.

## **Team and Expertise:**

PHC Staff are selected from attached roster 'PHC People'.

The PHC Service is executed by people trained on the PHC methodology and working within a wider team that references central data accessible to PHC People worldwide. There is a diverse contingent of PHC People across the three roles Strategist, Analyst and Administrator each with individual experiences and skills that all contribute to the PHC Service delivery.

The client can introduce additional PHC People at the Administrator level from client's company and from training programs for local indigenous people.

## Deliverables and Outcomes:

The central tool for visibility of project status is the weekly report that contains a comprehensive overview with drilled down detail contained in a collection of pdf dashboards, heatmaps and registers.

The Administrators will process feedback from project staff to maintain the seven PHC Lists.

The Analysts will arrange data in the PHC database for continual update in conjunction with review meetings facilitated with department and management staff.

The Strategists will organize information to form usable value lists and indexing structures, and will facilitate major reviews and participate in major client progress meetings.

## Budget and Pricing:

Cost for the PHC Service is a lump sum based on forecast for weekly hours expenditure over a defined period for a defined contingent of PHC Service staff from three roles: Strategist, Analyst and Administrator. For this proposal we have used our standard entry level for PHC Setup that envisages a Strategist and an Analyst working for three months. The lump sum cost derivation for this proposal is shown in the attachment ‘Service Cost Schedule’ that reconciles payment of the lump sum over the project duration. 20% of the lump sum is paid up front and the remaining 80% is spread over the number of months committed. At the end of the contract, a reconciliation amount is calculated that includes a charge for the difference (if any), this may be positive if there are more authorized hours than originally envisaged, or negative if not all hours originally envisaged are used. In case of negative difference, the amount constitutes a refund.

For continued or extended service, a new contract is established, with a different set of variables for establishing the lump sum.

For this Proposal one Strategist at 10 hours per week and one Analyst at 30 hours per week is proposed over a 3 month term.

The Contract sum of \$60,480 is spread over the three months as below:

	Hourly Rate to Person	PHC Provider Markup	Hourly Rate to Client	People in Role	Hours / Week	Contract Hours	Contract Cost
PHC 1 - Strategist	\$120	40%	\$168	1	10	120	\$20,160
PHC 2 - Analyst	\$80	40%	\$112	1	30	360	\$40,320
PHC 3 - Admin	\$43	40%	\$63	0	0	0	\$0
PHC 4 - Admin [Trainee]	\$13	40%	\$21	0	0	0	\$0
PHC 5 - Admin [Client]	\$0	40%	\$0	0	0	0	\$0
		40%		Months	3		
						480	\$60,480
Lump Sum Start	\$12,096		\$12,096	20%			
Monthly Split	\$16,128		\$16,128				
<b>Month</b>	<b>Payment</b>	<b>For Agent</b>	<b>Transfer</b>				
1	\$28,224	\$2,822	\$25,402				
2	\$16,128	\$1,613	\$14,515				
3	\$16,128	\$1,613	\$14,515				
4							
5							
6							
7							
8							
9							
10							

The service is predominantly served remotely, however if attendance at site is required the following shall apply, payable by the Local Rep and invoiceable directly to the Client:

- (1) For each day of attendance on site there will be a daily allowance of USD 120 payable directly to the PHC Consultant in country in local currency, weekly in advance.
- (2) For each visit to site, a mobilization fee of USD 500 to partially cover time spent travelling.
- (3) All accommodation and travel costs.

## **Terms and Conditions:**

Invoices are issued at the beginning of the period to which they apply. Payment is due immediately and expected within 15 days.

## **Next Steps:**

Following signed order for services.

- (1) An all party online meeting to resolve any questions.
- (2) An in-country Kick-off meeting
- (3) Start of PHC Service.

We believe that our consultancy services are well-suited to meet your organization's needs. Should you have any questions or require further information, please do not hesitate to contact us. We appreciate the opportunity to work with you and look forward to the possibility of partnering with [Client's Company's Name] with [Local Rep's name] acting as our duly authorized Agent.

Thank you for considering our proposal.

Yours sincerely,

David Winter - Director  
Order Efficiency Ltd

[Signature]

[Date]