

Date

Mr. Jim Customer  
Address  
Address

*Usually, I put this document on my business letterhead*

## Letter of Agreement

Thank you for selecting me as the independent contractor to design and develop XYZ, an intermediate level training project for *Your Customer*. Skills learned in training for new hires is a prerequisite for participation in this training and is the overall model for the design of the project.

### **Audience**

- The primary audience for this project is groups of new hire associates who are participating in the lengthy (13-week) telephone service training program that follows new associate orientation.
- The secondary audience is new telephone service representatives working in departments such as HelpDesk and TaxHotline.

### **Deliverables and Specifications**

- The primary deliverable is a set of training materials suitable for a pilot session tentatively scheduled for *date*. The materials include a Participant Guide, a Facilitator Guide, and several job aids.
- Topics identified: Knowledge of risk, Service skills, Ability to resolve complaints, Resource management, Service standards, Service teamwork. *Your Customer* has not identified which topics they want included in the pilot session.
- The format is modular in design; that is, each module can be part of a classroom event or can be presented separately in approximately one-hour blocks. The contract with *Your Customer* specifies that we will deliver the equivalent of one day of classroom training (approximately 6 hours, so approximately 6 modules).
- Classroom modules will include more generic concepts, while the modules to be delivered in smaller groups will include specific topics for specific groups.
- The Facilitator Guide will be developed in “bulleted list” style, not fully scripted, and set up for 3-ring binders. See the Unanswered Questions section for the Participant Guide format. Job Aids format also TBD later.
- Betsy Frick will provide to you one master hardcopy and one copy on diskette of the pilot materials in Microsoft Word 97 for Windows 98. She will email or provide hardcopy of interim materials for review to you and to the customer representative.

## Schedule and Estimate

- Work can begin upon signing of this Letter of Agreement. Betsy's Standard Terms and Conditions document on file with you applies to this project.
- These are the design and development milestones for the project:

Item	Description	Estimated Date
Develop Project Outline (design document)	List of generic topics and module breakdown for classroom event List of specific topics and audience for each Includes objectives and methods of evaluating each	March 3 Betsy, Jim, Sue <b>Obtain approval by ??</b>
Develop rough draft of one generic content module for classroom use	One complete module including participant and facilitator material from introduction to evaluation, of approximately one hour's running time. Topic – Handling complaints (maybe)	TBD, probably late March (Betsy may be unavailable March 6-20) Betsy
Internal review & revisions Customer review	To Jim for internal review, then after revisions, to Sue. Sue can distribute to others, and will condense comments before returning material to Betsy	2 days for internal review, 1 day for revisions, 1 week for customer review Jim and Sue
First draft of rest of modules, PG and FG	See Unanswered Questions for which modules to include in pilot session	TBD, probably send each as it is completed Betsy
Review	To Jim for internal review, then after revisions, to Sue. Sue can distribute to others, and will condense comments before returning material to Betsy	2 days for internal review, 1 day for revisions, 1 week for customer review Jim and Sue
Revisions, create 2 <sup>nd</sup> draft of each module, PG and FG	Time needed depends on how much content changed or added in revisions. Typically, second drafts take about ¾ the time of the first draft.	ASAP, send each as it is completed Betsy
Review of 2 <sup>nd</sup> draft	To Jim and Sue at the same time. Sue to condense all customer review comments into one copy before returning it to Betsy	One week after delivered Goal for late April Jim and Sue
Revisions to pilot level PG and FG	If the first draft is pretty clean, this should take only 1-2 days. Create job aids.	ASAP Betsy
Approval and signoff of pilot materials	Sue Use Betsy's approval form throughout the project	1 day turnaround Sue
Production of pilot session materials	Jim's consulting company	<b>By May 8</b> Jim
Conduct pilot session	Jim, Sue, Betsy, Sandy, Theresa, Lila as observers Pilot session audience TBD, but real participants please	<b>Monday, May 15</b> Who facilitates?
Pilot revisions	Debrief the session and make revisions to materials	Date TBD, Betsy
Other	Not part of this project as discussed in Scoping Meeting: Development of specific topic modules, Addition of any video, Train the trainer	Unscheduled

## ***Fees and Payment***

- Betsy's fee for this project is \$5,500 per half-day classroom training and \$5,000 per 3 separate modules, invoiced as listed below, and paid on a 1099 basis. Payments are due on the same schedule as for previous projects. See also the list of Unanswered Questions.
  - ✓ First invoice—upon signing of this Letter of Agreement—\$3,000
  - ✓ Second invoice—upon submission of first draft of first module—\$2,500
  - ✓ Third invoice—upon submission of first draft of rest of pilot modules—\$2,500
  - ✓ Fourth invoice—at completion of pilot revisions—\$2,500

### **Notes**

- Any work that exceeds the estimate (see table on page 2) will be billed at Betsy's regular hourly rate of \$\$, added to the applicable invoice. Items that might exceed the estimate include additional review and revision cycles, significant content additions or deletions, and meetings not factored into the estimate. Betsy also charges double her regular fees for weekend or holiday work not of her own choosing.
- Betsy will keep Jim and Sue apprised of progress during each phase of the project, reporting successes as well as problems in time to avoid crises with this extremely tight schedule.
- Expenses, such as courier service, are extra, billed at cost plus 10%, at the time of the applicable invoice. Betsy does not anticipate any billable expenses, but you never know.
- Should the project be cancelled or postponed, Betsy will invoice for the total amount due in the phase she is working on when the cancellation occurs. Project delays outside Betsy's control may incur delay fees of 25% of Betsy's hourly rate, billed at 6 hours per day.

## ***Betsy Frick's Responsibilities***

- Meet with Sue and subject matter experts to gather the data and existing training materials and to determine the preferred topics, format, layout, and length.
- Work at my location or meet with clients on site, as appropriate to get the work done.
- Provide an "in progress" diskette or email "working" versions to Jim as a safety precaution and for review purposes.
- Develop the materials in the agreed manner (Word 97).
- Create the final master hardcopy and electronic copy.
- Attend the pilot session as an observer and make "minor" revisions to pilot materials.

## ***Jim's Responsibilities***

- Manage the project; review the design and the materials before submission to customer.
- Help get answers to questions during the project.
- Submit drafts for review to Sue.
- Assist with getting reviews back in a timely manner from customer, and convey them to Betsy for revisions.
- Inform Betsy immediately of any changes to the schedule, design, or content of the program.
- Approve invoices for payment.

## ***Your Customer's Responsibilities***

- These are our main contacts at the customer:
  - ✓ Lila: project owner and signoff person
  - ✓ Sue: main contact
  - ✓ Sandy: subject matter expert
  - ✓ Theresa: subject matter expert
- Provide data, existing training material, and any other information needed to develop the training.
- Be available to answer questions as needed.
- Review and approve drafts and the pilot level materials.
- Work with us in a timely manner to keep the project on schedule.

## ***Unanswered Questions***

We need to get answers to these questions so that we can prepare the overall program outline that is due on March 3 and to establish an accurate timing schedule.

**Jim and Betsy need to discuss the detail level expected for the overall program outline.**

- ✓ Contact information for subject matter experts?
- ✓ What, exactly, are the performance gaps that this training will address?
- ✓ What, exactly, are the topics for the classroom (generic) part of the project?
- ✓ What, exactly, are the topics for the separate (specific) modules?
- ✓ What format for Participant Guide? Does it cover only the generic, classroom topics?  
What about participant materials for the specific topics?
- ✓ What is a realistic goal for content development for the pilot session in May?
- ✓ Can we use the Telephone Skills Workshop developed earlier as part of this project? If so, can we use it as is, or do we need to fold it into this training material?
- ✓ What kind of evaluation of skills does the customer expect? Betsy and Jim prefer hands-on demonstrations of skills over paper and pencil tests.
- ✓ How complete does the customer expect the pilot session materials to be?
- ✓ How long does the customer expect the pilot session to be? One day? More? Less?

## **Signatures**

Please sign both copies of this Letter of Agreement, keep one for your records, and return one to Betsy Frick.

## **Plain Language Solutions**

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Betsy Frick, Owner

Date

## **Jim's company name**

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Jim, President

Date

Any changes to this agreement must be in writing and be signed by both parties.