

The consulting proposal

Engagement: Quarrington Home Services marketing operations

Reference: [QHS-01]

Date: [date] · Version: 1.0

1. WHO THIS IS FROM, AND FOR

1.1 Prepared for: Quarrington Home Services, [address]. Client contact: [name, title, email].

1.2 Prepared by: [your agency name], [address, email].

1.3 Named approver: [name, title, email]. Only this person's written yes changes anything priced in this proposal.

1.4 Everything priced here holds for 30 days from the date above.

2. WHAT QUARRINGTON ASKED FOR

2.1 Quarrington Home Services runs heating, cooling and plumbing work out of five branches, with 62 field staff and one marketing coordinator.

2.2 Leads arrive through five branch phone numbers, one web form, two paid search accounts and a directory listing per branch, and no record connects a lead to the branch that eventually books it.

2.3 Marketing spend rose 34% last year and booked jobs rose 6%, and the reason has never been isolated.

2.4 You asked us to find where the money goes, decide which channels to keep, and stay close enough for two quarters that the decisions hold once the branches are working to them.

3. WHAT WE'RE PROPOSING TO DO

3.1 Phase one, marketing operations audit, weeks 1 to 4. We trace all nine lead sources end to end, spend two days on site observing call handling at two branches, read twelve months of spend against booked jobs, and deliver one written audit with a recorded walkthrough.

3.2 Phase two, channel and lead-routing plan, weeks 5 to 8. One written plan covering which channels to keep, cut or test, how a lead reaches the right branch, and what each branch owns. Two revision rounds are included.

3.3 Phase three, advisory retainer, months 3 to 7. Two 90-minute working sessions a month with up to four named Quarrington participants, one written readout a month, and email answers inside two business days.

3.4 The four named participants for 3.3 are [name], [name], [name] and [name]. Sessions with anybody else are priced in 6.2.

4. WHAT THIS ENGAGEMENT DOESN'T INCLUDE

4.1 Carrying out what the plan recommends. Building campaigns, writing ad copy, configuring your CRM and making the routing changes are excluded from the fee and priced at 6.3.

4.2 Media spend, which you pay to the platforms directly.

4.3 Software, call tracking and reporting licenses, which you buy and keep.

4.4 Hiring, performance management and the day-to-day supervision of your marketing coordinator.

5. HOW THE WORK RUNS

- 5.1 Start date: [date]. Phase two is delivered eight weeks later, and the retainer runs for the five months after that.
- 5.2 The audit needs read access to both paid search accounts, twelve months of job records and the branch call log by [date]. Each working day those are late moves every date in 5.1 by a working day.
- 5.3 A session cancelled with less than two business days' notice counts as one of the two for that month.
- 5.4 Unused sessions don't carry into the following month.
- 5.5 The audit and the plan are accepted when the named approver says so in writing, or ten business days after delivery if nobody replies.

6. WHAT ANYTHING ELSE COSTS

- 6.1 A working session beyond the two included in a month: \$780.
- 6.2 A working session with any group other than the four people named in 3.4, such as branch managers, the board or a supplier: \$1,450, which covers preparing for that audience. This applies whether or not the month's two included sessions have been used.
- 6.3 Carrying out anything the plan recommends: \$155 per hour, quoted in writing and agreed before it starts.
- 6.4 A revision round on the phase two plan beyond the two included: \$640.
- 6.5 A second written readout in the same month, prepared for a different audience: \$890.
- 6.6 A day at a branch beyond the two in 3.1: \$1,100.
- 6.7 Anything not named above: \$155 per hour.

7. WHAT IT COSTS

- 7.1 Phase one, marketing operations audit: \$9,600.
- 7.2 Phase two, channel and lead-routing plan: \$7,200.
- 7.3 Phase three, advisory retainer, five months at \$4,320 a month: \$21,600.
- 7.4 Total: \$38,400.

8. WHEN IT GETS PAID

- 8.1 \$9,600 on acceptance of this proposal.
- 8.2 \$7,200 on delivery of the phase two plan.
- 8.3 \$4,320 on the first day of each retainer month, five times.
- 8.4 Invoices are payable within 14 days of issue.

9. HOW A CHANGE GETS AGREED

- 9.1 Anything in section 3 that Quarrington changes after accepting this proposal is requoted before it's done, at the rates in section 6 where one of them applies.
- 9.2 A request arrives as one written line, comes back with a price and a date effect, and starts when the approver named in 1.3 replies yes.
- 9.3 Work paused by Quarrington for more than twenty business days is requoted at the rates in force when it restarts.

10. WHAT HAPPENS AT THE END

10.1 The retainer finishes after the fifth month unless both sides agree in writing to continue it, either at the rates in section 6 or under a fresh proposal.

10.2 The audit, the plan and every readout are yours to keep and reuse.

10.3 Either side may end the retainer on 30 days' written notice, and sessions already held in the notice month are payable.

11. ACCEPTANCE

11.1 This proposal sets out the work and the price. It becomes binding when both signatures below are dated, or when a separate agreement names it by reference and version.

11.2 Signing it accepts sections 3 through 10 as written.

For Quarrington Home Services: _____ Date: _____

For [your agency]: _____ Date: _____