

How we engage with our client-partners...

Communication, documentation, expectations

Dear Client-Partner;

Each meeting, each engagement, each step in our client-partner journey is an important investment for your company, and Strategic Balance takes this responsibility seriously. Our work with you is all about your business and supporting the decisions and initiatives that shape the future and the future health of your company and your team.



The purpose of this letter is simply to align expectations regarding how we choose to communicate with you during each phase of our journey together. Strategic Balance delivers full solutions for your business that require full communication. In place of casual notes and brief letters, some of our documentation may appear daunting. It's not. It is merely a full and required documentation of our combined views and responsibilities in bringing further success to your company.

the definition of your needs in any given project, and to formally agree upon this definition. It is not implied as a work order or contract for services, only as a tool to make certain that both sides of this team are fully prepared to move forward in the spirit of success.

About Our Process:

Letter of Understanding

At times Strategic Balances solicits client's needs, and at others, clients ask Strategic Balance for specific services. In each case, Strategic Balance strives to first understand the client's situation from a Culture, Technology, Process, and Strategy perspective. Second, we work diligently to articulate a set of desired outcomes, and measurable deliverables that will effectively address the client opportunity at hand. The Letter of Understanding is our tool to help document these two fundamental criterions for an eventual, successful, engagement. The client is actively engaged in adding, subtracting, and adjusting this document during this time.

After a mutual understanding is arrived upon with our Client-Partner, the investment for the proposed deliverables can be developed. Factors that influence the investment for the deliverables will also be considered and documented at this time such as: Client participation levels, estimate assumptions and risks, travel costs, etc.

Master Services Agreement

Shortly after engaging in the preliminary development of the Letter of Understanding, Strategic Balance presents a comprehensive Master Services Agreement that defines the successful partner relationship with our client-partners. The document details the functional engagement with and protects our mutual success from a procedural and legal perspective.

Non-Disclosure Agreement

In order to keep safe both partners' proprietary and sensitive business information, Strategic Balance, has developed a unilateral non-disclosure agreement that is a necessary foundation for open and candid business discussion.

Work Order

Since the client has been engaged actively and closely in each of the prior steps, the Work Order becomes a nearly duplicate copy of the Letter of Understanding. In this phase, however, one difference is that it is legally attached to the MSA, where all of our client-partner terms & conditions have been completely and equitably articulated.

Team Commitment Worksheet

It is paramount to the success of our project to help you solicit, guide and gain commitment on each project member's time commitment to the project. As well, this worksheet serves as documentation regarding events and issues that may impede the projected involvement of each team member.

Flow:

