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****Date****

****Joe Prospect****

****President & Founder****

****BigCo****

Dear ****Joe****,

Thanks for your time on the phone the other day. On the following pages, I have outlined three monthly retainer options of increasing complexity for the engagement. The options are incremental, meaning that each includes and builds upon the previous option(s). This will allow you to pick a level that suits the urgency, your level of comfort with risk, and of course, your budget.

When you get a chance, please review and let me know if you have any questions or comments. I'll touch base with you on Thursday if I haven't heard back by then.

Sincerely yours,

Jonathan Stark

PROJECT OVERVIEW

The **BigCo** website has been quite successful for you but the code base at the heart of your business has become difficult to extend and maintain. For example, at least one potential partner (i.e., **Managed Hosting Company**) has told you that they'd prefer not to touch the code because it was setup in a non-standard way that doesn't make sense.

This is a perfectly common state of affairs for a business that came into being as yours did - i.e., you started off with a minimum investment to validate the business model and things grew in fits and starts organically as the business gained traction.

Now that the model has been proven, you are starting to outgrow the architecture that you have created. This is natural result of the business being successful without a commensurate investment in IT, so in a sense it's a good thing. You bootstrapped your way to a proven business model - congrats are in order! Now it is time to make an investment in IT so you can take the business to the next level.

The forcing factor here is mobile. You are getting more and more traffic coming to the site on mobile devices. You understand that mobile is rapidly becoming the world's primary computing platform (e.g., smartphones will outnumber PCs by a factor of 2-3x in the next five years). Unfortunately, your primary site is not mobile friendly at all and it is infeasible to correct this with your legacy architecture.

Because of these and other factors, you have decided to rewrite the site from the ground up as a responsive site that will communicate with the old backend (i.e., **Hosted e-Commerce Platform**) via API calls made between the servers in the background. You have recently hired a full time lead IT person and are looking to hire one more who will be junior level.

You recognize that you are at the start of a new architecture cycle and that there are some gaps in your internal IT expertise. You don't want to shoot yourself in the foot right out of the gate, and have reached out to me to fill the gaps as you work through this foundational stage. This is smart because getting things wrong at this point will land you right back where you are - trapped by your infrastructure instead of empowered by it.

PROJECT OPTIONS

Below I have listed three possible levels of involvement. They are all monthly retainer services that give you unlimited access to my expertise in specific areas. They are open ended, meaning that you can keep me on as long as you like - in fact, a number of my retainer clients have kept me on for multiple years. Based on our conversations, I would estimate that you will need my assistance for a minimum of three months.

Option 1: Responsive Web Design Coaching

I will meet with the team initially to validate and inform the plans for the redesign. After the kickoff, I will meet weekly with the team to review progress, answer any questions, and generally keep the code clean from the outset. In addition, the dev lead (i.e., **Mary**) will have unlimited 24/7 access to me via phone, email, and chat. I return all messages no later than the next business day, although in practice response time is much quicker (particularly between 9am to 5pm ET, but also nights and weekends).

Topics that fall under this option include:

- Help selecting a PHP framework that will minimize development time
- How to structure markup to enable maximum flexibility and reuse
- How to use progressive enhancement in CSS and JavaScript to gain maximum market reach

- Provide testing strategies for mobile and non-mobile devices to ensure a positive user experience regardless of the age of the customer's device or browser

Option 2: Development Workflow Coaching

This option includes everything from option 1, but extends my involvement to the workflow aspects of the project. My involvement at this level will make the project run more smoothly during active development, but perhaps more importantly it will set up a workflow that you will continue to benefit from indefinitely. Topics that fall under this option include:

- How to structure code repos to enable fast and reliable development
- Defining an SOP for releases to dev, staging, and production environments to decrease the likelihood of customers and partners encountering critical bugs on the live website
- How to set up automated unit testing so that new features can be published to the live website very quickly once built
- Optimization of project management and communications to minimize the likelihood of project overruns based on internal communication latency or misunderstandings

Option 3: Server Admin Coaching

This option includes everything from options 1 and 2, but extends my involvement to the server-side aspects of the solution. Topics that fall under this option include:

- How to optimize the web server and database for maximum stability and performance
- How to set up alerts to surface runtime exceptions (i.e., errors on the live website) immediately so that we can reassure customers and partners that we're aware of the issue and are working on it
- How to set up automated backups so that the business can recover from a catastrophic website outage that could otherwise last indefinitely
- How to scale servers to handle increased traffic in the future so that spikes in traffic won't cause the website to slow down/go down
- Identify potential bottlenecks to performance in order to support future growth in traffic

RISKS & ASSUMPTIONS

- Risk: Your lead developer could leave the company, in which case we could if you like refocus the engagement on finding a viable candidate to fill the position, and then returning to the project at hand.
- Risk: Your lead developer will continue to be pulled away from this project to put out fires in other areas.
- Assumption: Your lead developer will be available via Slack chat during regular business hours.
- Assumption: I will have reasonable communications access to upper management and can expect response times to be less than 2 business day for any questions.
- Assumption: The management team will review changes and provide feedback in a timely fashion periodically throughout the course of the project.

WHY ME?

There are all sorts of smart cookies in the mobile world who could potentially help you with this project. So why work with me? Here are several reasons that I hope you will find compelling:

- You will work directly with me and only me - i.e., you won't be shuffled off to junior employees or subcontracted labor.
- I don't bill by the hour so you always know in advance what the financial investment will be for my intervention.
- I've written three books on mobile and web development, including the best selling O'Reilly title "Building iPhone Apps with HTML, CSS, and JavaScript" which is available in seven languages.
- Through my training classes, screencasts, and webinars, I've taught thousands of web designers and developers how to build sites for mobile devices. I know my stuff - but more importantly I know how to teach it.
- I was chosen to help with the mobile responsive redesigns for Entertainment Weekly, Time Inc. and Techcrunch, all of which were highly successful projects.
- I've helped a number of companies successfully reinvent themselves for mobile by migrating their legacy backend architecture to modern cloud services.
- One of my long term retainer clients is in your industry (e.g., ****myclientwebsite.com****), so I've spent years immersed in it in a "behind-the-scenes" capacity. Not only do I have domain expertise in your area, but I find the industry fascinating.

TERMS AND CONDITIONS

I never assess an hourly or daily fee, since you should not have to make an investment decision every time my assistance may be needed. This is a unique feature of my consulting practice.

The monthly pricing for each option is as follows: option 1 is \$7,000.00/mo, option 2 is \$10,000.00/mo, and option 3 is \$12,000.00/mo USD.

Fees must be paid in full at the beginning of each period.

You may upgrade, downgrade, or cancel your selection at the beginning of any period.

You can avail yourself of a 10% discount by paying in advance for a block of three months.

My work is guaranteed. If at any point in our first 30 days you decide that I am not meeting the standards described herein, just request a refund and I'll send your money back, no questions asked.

This proposal is good for 14 days from the date on page 1.

Please check the option you prefer and sign below:

Option 1 _____ Option 2 _____ Option 3 _____

Name: Jonathan Stark	Name: **Joe Prospect**
Signature: **Signature**	Signature:
Date: **Date**	Date: