

A grayscale photograph of two hands shaking over a desk. In the background, a scale of justice is visible. In the foreground, a contract document is open on a clipboard, with the words "CONTRACT AGREEMENT" visible on the document. The image is overlaid with a teal and purple graphic design.

ODF INDIE CONSULTANT SERIES

CONTRACTING FOR SUCCESS

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THE CONTRACTING CONVERSATION

- The contracting conversation begins on *first contact*
- It continues *even after* the contract is signed
- The contracting conversation includes:
 - What we will *do together* (e.g., scope, deliverables)
 - How we will *work together* (e.g., roles, responsibilities, how to give and receive feedback)
 - The *commitments* we make to each other (e.g., price, terms and conditions)
- It is important to contract *explicitly*; don't assume you understand each other!



CONTRACT & PROPOSAL CONSIDERATIONS



BRIEF

- What the client is hoping to solve



WHAT THEY GET

- Deliverables
- Timeframe
- Resources



TERMS

- Payment terms
- Cancellation terms
- Revisions
- Client's contracts



NDAs

TOP TIPS

1. **Choose language carefully**

- Words have different meanings to different people
- Make sure to use plain speak, not consultant terms

2. **Focus on shared understanding**

- Do we see the problem the same way?
- Are we clear on our solution approach?

3. **Help your clients do the right thing**

- Spell out your terms
- Be clear about their role, too

4. **Continuously check in**

- The contract is there to be used – check yourself and the client against it
- Recontract as needed

5. **If your client wants changes...**

- *Charge* for additional items and/or complexity
- Lower price by changing scope