

# THE CONTRACTING CONVERSATION

- The contracting conversation begins on first contact
- It continues even after the contract is signed
- The contracting conversation includes:
  - o What we will do together (e.g., scope, deliverables)
  - How we will work together (e.g., roles, responsibilities, how to give and receive feedback)
  - o 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!

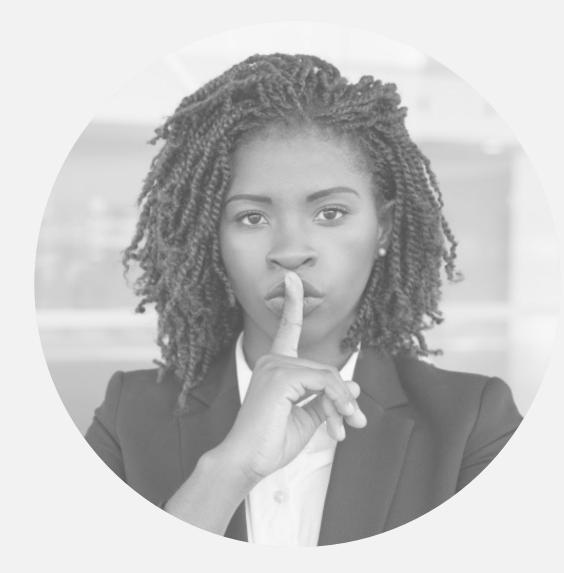


# CONTRACT & PROPOSAL CONSIDERATIONS









#### 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