

## **Project/Proposal/Letter of Engagement**

After the initial contact with the client and some team discussions, the student team should be able to formulate a work statement or work plan which is referred to as the Project Proposal or "Letter of Engagement". The signed work plan is, in effect, a contract between the client and the student consulting team. This work plan defines clearly and concisely what the SBI team will do. It should include a statement of the client's needs and the various matters to which the SBI team will address itself and the order in which the work will proceed.

"Request For Consulting" may be modified to serve as a "Letter of Engagement" citing the work areas to be included in the study.

The owner/manager (acting on behalf of the client) and the student consulting team members must all sign and date the form denoting the work areas to be addressed.

This document becomes part of the permanent case documentation kept by the SBI Director for each project.

For alternative form, see SBIDA's *SBI Student Consulting Manual*.

SMALL BUSINESS INSTITUTE®  
COLLEGE/UNIVERSITY  
LOCATION

Date:

Company Name

Address

City, State, Zip

Dear Mr./Mrs./Ms

The purpose of this letter is to (1) verify that we intend to pursue the Small Business Institute® consulting project that we discussed with you on our recent visit, (2) explain our understanding of the tasks that we are expected to accomplish, and (3) advise you of the information and material we expect to be needed to complete those tasks. We are required to bring to your attention the following statement concerning the nature of the student consulting engagement that we are embarking upon:

"The Small Business Institute® (SBITM) is made possible through an agreement between University) and the Small Business Institute Directors' Association (SBIDA). The analysis, recommendations, and final report that will be provided are based on provisions of that agreement. The report that you will receive should not be interpreted as the official position of (University) or SBIDA. Rather, it will contain views and opinions of the SBI student team based on discussions, observations, investigations, and analysis of your firm's operations and its business environment."

Based on our discussion with you on (day, date), we intend to accomplish the following tasks in the process of completing this consulting engagement:

1. (Describe the first task.)
2. (Describe the second task, if appropriate.)
3. (Etc.)

We expect to generate useful recommendations as a result of our completing the above tasks. We hope that our recommendations will be of some assistance to you in achieving the long run effectiveness of your firm. Our goal is to provide a final written report and oral briefing for you by (end of semester).

In order to accomplish the tasks outlined above, we will need the following material and/or information:

1. (Describe the first item of information or material).

2. (Etc.)

Your assistance in expediting the above material and information is appreciated. Please inform us if you have any questions concerning our interpretation of the work to be accomplished.

Page 2

Thanks for giving us this opportunity to apply our knowledge and skills in an actual business environment. We are looking forward to an interesting and challenging assignment.

Sincerely,

_____	_____	_____
Student Consultant, typed name	Student Consultant, signature	Date

_____	_____	_____
Student Consultant, typed name	Student Consultant, signature	Date

_____	_____	_____
Student Consultant, typed name	Student Consultant, signature	Date

_____	_____	_____
Student Consultant, typed name	Student Consultant, signature	Date

_____	_____	_____
Director, SBI, typed name	Director, SBI, signature	Date

Proposal received and acknowledged:

_____	_____	_____
Client Name, typed name	Client Signature	Date