



## Appendix A

# Sample Business Intelligence Contract

*Note:* This sample contract is not intended to represent a legal recommendation. Your legal counsel must approve your contracts.



### Situational Summary

ABC INTERNATIONAL (ABC) wants to pursue active growth, increase revenues and profit, differentiate itself in the marketplace, and establish a brand that includes its well-deserved reputation for integrity and customer service.

Under the leadership of the current CEO, Julia Valdez, ABC has achieved significant growth systematically over the last nine years. To ensure continued growth it is necessary to secure business intelligence and act on it.

### Objective

Gather the intelligence required to increase penetration in the marketplace.





Today there are 120 million customers that fit the ABC customer profile, yet ABC does business with only 25 million. This represents a significant opportunity for growth. Business intelligence will help define

1. Value-drivers that succeed in attracting those who are not yet customers.
2. Barriers to entry among the 95 million who are not yet customers.
3. Innovation initiatives that will support ABC to harvest a greater percentage of the market.

### **Measures of Success**

1. ABC has in its possession intelligence that will increase customer base.
2. Due diligence has been conducted to include the perceptions and experience of staff, key customers, strategic partners, qualified prospects who have not become customers, market influencers, and thought leaders.
3. The results are analyzed and presented making clear options that provide ABC leadership with the knowledge they need to design and execute a customer development strategy.

### **Value to the Organization**

Intelligence will inform the strategy to increase market penetration by

1. Expanding ABC's customer base
2. Providing greater influence and increased opportunities for innovation
3. Enabling innovations that increase profitable revenue generation

### **Methodology and Time Line**

- March–April: Interview ABC staff and key customers, industry experts, thought leaders, qualified potential customers who have chosen not to invest, and influencers. Work together with CEO,



- COO, and the senior team to identify and contact key sources of information.
- May–June: Prepare for and participate in the senior leadership retreat including sitting in on peer councils, running focus groups, meeting with key individuals for one-on-one interviews.
  - July–September: Provide an interim report to the CEO, then determine: (a) what new developments must be taken into consideration, (b) how the results to date influence the information required to succeed, and (c) what changes if any are required to provide the best possible result.
  - October: Work together under the guidance of CEO and COO to prepare a briefing for the November board meeting including identification of (a) market conditions, (b) challenges unique to the industry, (c) opportunity targets, and (d) recommendations for growth.
  - November 18–20: Meet with the board to present and discuss recommendations.

### **Joint Accountabilities**

This work will be a joint project carried out by ABC’s CEO, Julia Valdez, and the XYZ Business Intelligence Agency under the CEO’s supervision. Julia Valdez will provide

- Active participation and access to staff members and key partners as needed.
- Facilities, scheduling, and logistical support for any sessions to be conducted.
- Secretarial and administrative support for scribing and assembly of all documentation.

XYZ will provide

- Intellectual capital in the form of ideas, challenges, critique, and related discussions based on their experience with other organizations, leaders, and research.



- Leadership to drive the process including guidance on the development of a robust plan of action to achieve business growth.

XYZ will sign any nondisclosure agreements required to conduct business effectively. Both parties agree to immediately inform the other of any developments that might affect the success of this project. ABC agrees to support XYZ in executing the duties their role requires, which may include challenging conventional or accepted ways of carrying out work. In return, XYZ agrees to support all decisions made by ABC.

### **Terms and Conditions**

Fee for this project: \$99,999

ABC agrees to pay all travel, lodging, and meal expenses while traveling and to reimburse XYZ within 30 days of invoice date.

XYZ assumes administrative fees associated with their work including any required duplication, fax, shipping, and postage.

This contract is non-cancellable for any reason, although it may be postponed and rescheduled at any time, with no penalty, subject only to mutually convenient time frames.

### **Acceptance**

This proposal is accepted and forms an agreement between ABC INTERNATIONAL and XYZ Business Intelligence Agency.

Titles, names, signatures, and dates of responsible parties.