

Fast, accurate, repeatable quoting for Professional Services firms

**TAKING THE PAIN OUT OF PRICING
AND QUOTING ON EXCEL AND WORD**

Quoting - how it works today...

BRONZE Toolkit															
Includes:	Stage 1:			Stage 2:			Stage 3:			Stage 4:			Stage 5:	Stage 6:	Stage 7:
	PROJECT SET UP, STRATEGIC APPROACH & CREATIVE BRIEF			CONCEPT DEVELOPMENT & KV			MESSAGING MATRIX			DESIGN TOUCHPOINT DEVELOPMENT					
Content TBA. May include: Shoppers strategy to include shopper journey/path to purchase, messaging matrix. Triple win statement, KV, visual guide to up to 8 x touchpoints, 2 x activations.	Local toolkit origination Receipt of Brief, Kick off meetings, Timings / Resource allocation Shopper Insights			2 x concept proposals 1 x Concept developed 1 x KV 3 rounds of amends			Complete, populated Template - in store zones only 3 rounds of amends			Up to 8 x touchpoints 3 rounds of amends					
Not inclusive:	1 x Key Shopper Mission The Shopper Jobs to be done The Shopper Journey Map (up to 2 channels) (Inc. Barriers, Triggers & Tasks) Triple Win Plan Creative Briefing														
Stock imagery and commissioned photography															
	Rate	Qty	Total	Rate	Qty	Total	Rate	Qty	Total	Rate	Qty	Total			
Account Management															
Client Services Director	£290	2	£580	£290		£0	£290		£0	£290		£0			
Business Director	£180	4	£720	£180	4	£720	£180	2	£360	£180	4	£720			
Account Director	£105	4	£420	£105	6	£630	£105	4	£420	£105	6	£630			
Account Manager	£70	7	£490	£70	8	£560	£70	6	£420	£70	8	£560			
Account Executive	£50	7	£350	£50	8	£400	£50	6	£300	£50	8	£400			
Planning															
Chief Strategy Officer	£315	1	£315	£315		£0	£315		£0	£315		£0			
Planning Director	£165	10	£1,650	£165	1	£165	£165	2	£330	£165	1	£165			
Junior planner	£50	20	£1,000	£50	5	£250	£50	8	£400	£50	2	£100			
Project Management															
Project Manager	£70	7	£490	£70	8	£560	£70	2	£140	£70	8	£560			
Creative															
Executive Creative Director	£310		£0	£310	2	£620	£310	1	£310	£310	1	£310			
Creative Director	£190		£0	£190	4	£760	£190	4	£760	£190	4	£760			
Art Director	£90		£0	£90	18	£1,620	£90		£0	£90	10	£900			
Copywriter	£90		£0	£90	18	£1,620	£90	18	£1,620	£90	4	£360			
Design and Development															
Designer	£90		£0	£90	14	£1,260	£90		£0	£90	21	£1,890			
3D Designer	£125		£0	£125		£0	£125		£0	£125	21	£2,625			
Illustrator	£125		£0	£125	14	£1,750	£125		£0	£125		£0			
3rd Party Costs, contingency & expenses															
			£0			£0			£0			£0			
			£0			£0			£0			£0			
Sub Total		62	£ 6,015		110	£ 10,915		53	£ 5,060		98	£ 9,980			
Total		481	£ 47,645												
			13%			23%			11%			21%			

Exhibit 4.1: Proposed price for Workstream #1

Proposed Team Structure	Weekly Rate	Weeks	Total Price
Partner/Associate Partner leadership; plus 5 full-time consultants; additional subject matter experts; as well as research and support from COVID centers of excellence	\$181,560	1-6	\$1,089,360
Partner/Associate Partner leadership; plus 2 full-time consultants; additional subject matter experts; as well as research and support from COVID centers of excellence	\$127,500	7-10	\$510,000
SUBTOTAL Firm Fixed Price for Workstream #1			\$1,599,360

Exhibit 4.2: Proposed price for Workstream #2

Proposed Team Structure	Weekly Rate	Weeks	Total Price
Partner/Associate Partner leadership; plus 4 full-time consultants; additional subject matter experts; as well as research and support from COVID centers of excellence	\$168,300	1-8	\$1,346,400
Partner/Associate Partner leadership; plus 2 full-time consultants; additional subject matter experts; as well as research and support from COVID centers of excellence	\$127,500	9-12	\$510,000
SUBTOTAL Firm Fixed Price for Workstream #2			\$1,856,400

Exhibit 4.3: Proposed price for Workstream #3

Proposed Team Structure	Weekly Rate	Weeks	Total Price
Partner/Associate Partner leadership; plus 5 full-time consultants; additional subject matter experts; as well as research and support from COVID centers of excellence	\$181,560	1-8	\$1,452,480
Partner/Associate Partner leadership; plus 3 full-time consultants; additional subject matter experts; as well as research and support from COVID centers of excellence	\$144,840	9-12	\$579,360
SUBTOTAL Firm Fixed Price for Workstream #3			\$2,031,840

Exhibit 4.4: Total proposed price for Workstreams #1-3

TOTAL Firm Fixed Price for all Workstreams	Total Price
	\$5,487,600

Each of the teams as described in Exhibits 4.1-4.3 includes at least one full-time Engagement Manager; the balance of full-time consultants may be a mix of Specialists, Associates, and/or Business Analysts. Engagement Managers,

Quoting - how it works today...

Stage 1:						
PROJECT SET UP, STRATEGIC APPROACH & CREATIVE BRIEF						
Local toolkit origination						
Receipt of Brief, Kick off meetings,						
Timings / Resource allocation						
Shopper Insights						
1 x Key Shopper Mission						
The Shopper Jobs to be done						
The Shopper Journey Map (up to 2 channels) (Inc. Barriers, Triggers & Tasks)						
Triple Win Plan						
Creative Briefing						
Account Management	Rate	Qty	Total	Rate	Qty	Total
Client Services Director	£290	2	£580	£290		£0
Business Director	£180	4	£720	£180	4	£720
Account Director	£105	4	£420	£105	6	£630
Account Manager	£70	7	£490	£70	8	£560
Account Executive	£50	7	£350	£50	8	£400
Planning						
Chief Strategy Officer	£315	1	£315	£315		£0
Planning Director	£165	10	£1,650	£165	1	£165
Junior planner	£50	20	£1,000	£50	5	£250
Project Management						
Project Manager	£70	7	£490	£70	8	£560
Creative						
Executive Creative Director	£310		£0	£310	2	£620
Creative Director	£190		£0	£190	4	£760
Art Director	£90		£0	£90	18	£1,620
Copywriter	£90		£0	£90	18	£1,620
Design and Development						
Designer	£90		£0	£90	14	£1,260
Designer	£125		£0	£125		
Animator	£125		£0	£125	14	£1,750
Agency Costs, contingency & expenses			£0			
			£0			
		62	£ 6,015		110	
		481	£ 47,645			
			13%			



Problem – quoting today

Slow manual process

- Spreadsheets and templates
- Collaboration via email
- Approval bottlenecks
- Data in personal files
- Manual merging of documents

Lacks consistency

- Reinvent the wheel each time
- Optimism bias, experience gaps
- Regional variations – taxonomy and pricing
- Embarrassing inconsistencies

Lacks accuracy

- Finger in the air quoting
- Old rates, version confusion, spreadsheet errors
- Missed work elements, manual entry mistakes
- Quotes go out without approval .

Painful

- Toxic billable hour, talent burnout
- No recognition for innovation and complexity
- Can't analyse demand pipeline ...

Solution.

Take the pain out of pricing and quoting. Replace Excel and Word, with a **tool** that offers fast, accurate quoting, approval and document generation.

SCOPE



- **Fast** quote in minutes not days.
- **Accurate** improve recovery by 12-25%.
- **Repeatable** 100% – defined service catalog and rate cards
- **Effective** efficiency gains of up to 56%.

With the familiarity of Excel and Word



Solution - SCOPE



Scope + price

1

Teams build the quote with defined services, tasks, pricing, discounts etc.



Approve

2

The right people review the right [version] quote before it flies out the door.



Generate Quote

3

Export to Word, Excel, PFD, DocuSign



Analyse

4

Predict services pipeline
Track average margin per engagement. Understand service & staff demand.

Integration



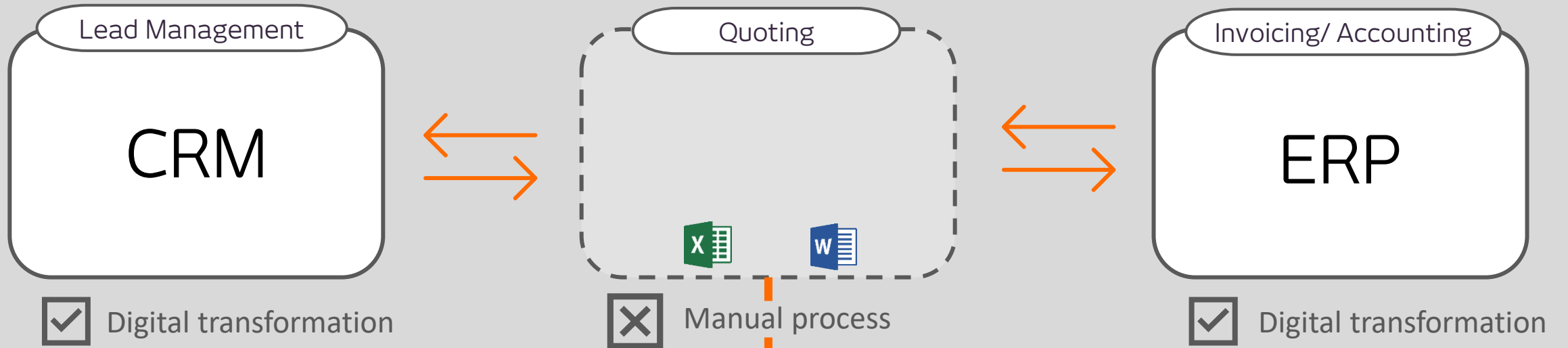
CRM, ERP, Accounting systems (pull opportunity, client and rate card data into SCOPE)

PPM, PMS, Workflow, Analytics systems (push quote data from SCOPE out)



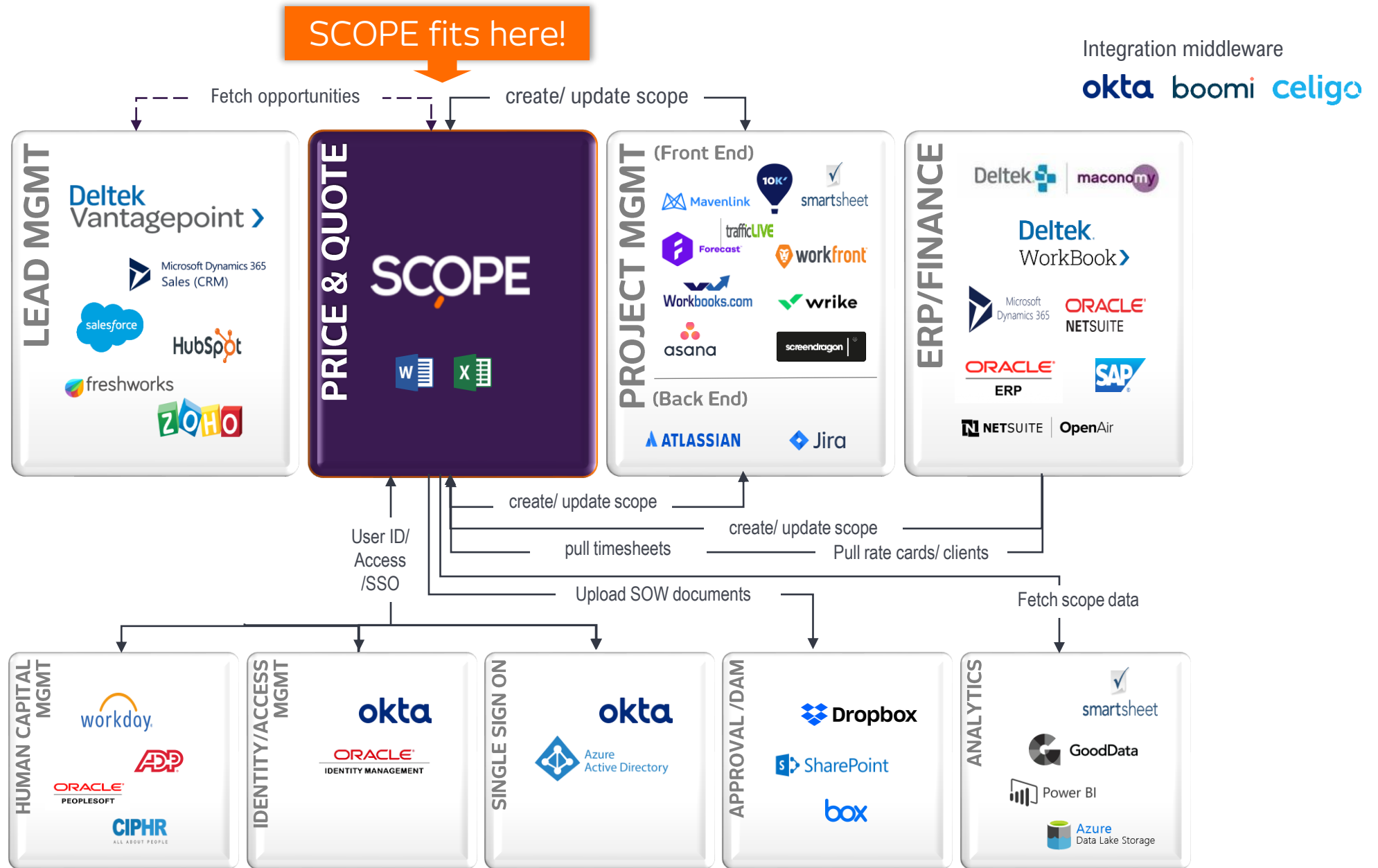
SCOPE fills this gap...

SCOPE



- Pricing
- Scoping
- Document generation
- Approvals
- Integration

INTEGRATION ECOSYSTEM



Who we work with

Holding companies



Clients



SCOPE

Configuration

- ✓ Easy to set-up Service Book
- ✓ Granular drag & drop configuration
- ✓ Auto-adjustment for complexity

Pricing

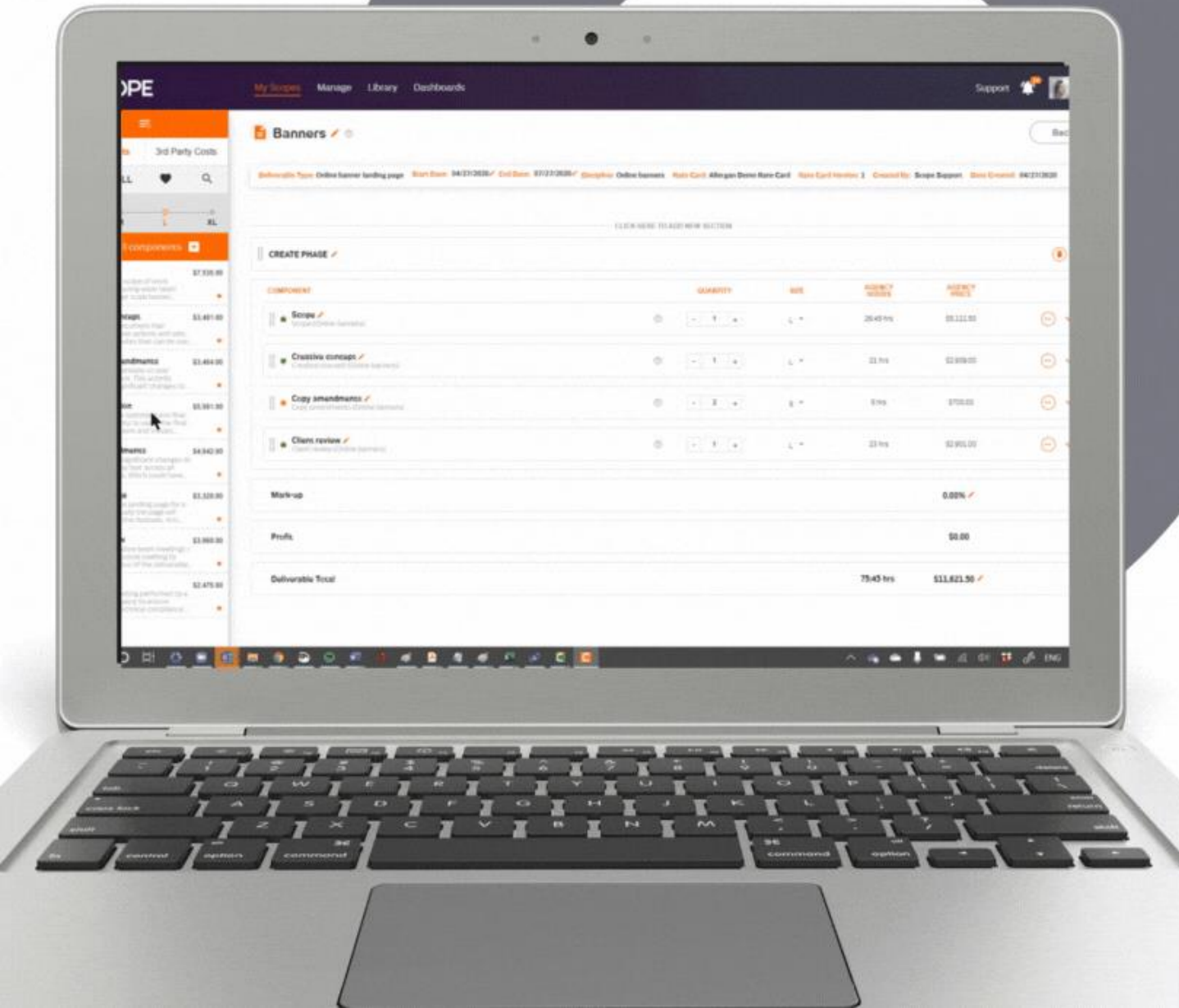
- ✓ Pricing stack – T&M, fixed fee, more
- ✓ Discounting & MSA terms
- ✓ Approval workflow
- ✓ Lockable terms & conditions
- ✓ Feedback route (sales v actual)*

Quoting

- ✓ Categorisation
- ✓ Version control
- ✓ Document template customisation
- ✓ Document generation

* Open API & pre-built integrations

- ✓ ERP
- ✓ CRM
- ✓ Project /Practice / Workflow Management



**For more information or to
book a demo, go to...**

scopebetter.com

or contact

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