



Fractional Officer Method

PROPOSAL

YOUR SOLUTION NAME

Summary

Include a short summary of your proposal here in order to give the company a way to take a quick snapshot of what you will provide. Generally it is a summary of the executive summary section.

First Last Name
youremail@email.com

Executive Summary

[First Name] [Last Name], founder of [Fractional Executive Company], stands as an exemplary figure in the modern business landscape with an illustrious career ...

Include a short bio of your background and experience

In recent years, [First Name] has been at the forefront of leading outcomes at multiple companies as a Fractional Executive. By employing proven strategies, [First Name] pioneers methods to drive your objectives and solve business challenges.

When you engage with the [Fractional Executive Company] services, you're investing in:

1. **Leadership:** [First Name] offers top-tier, C-suite caliber leadership, alleviating CEOs and Company Executives from managing departments nuances while effectively steering the team toward success.
2. **Building an Elite Team:** The executive expertise fosters the nurturing or transformation of your company functional strategy and team. By blending proven methods and years of experience, the Executive will chart a path to business success.
3. **KPI-Driven Outcomes:** No longer will the department or team stagnate in repetitive tasks. Under the Executive leadership guidance, the focus sharpens on tangible outcomes anchored by measurable results.
4. **Predictable Success:** As an Executive the focus is in the confluence of data, process, and efficiency. This synergy ensures that the business choices you make are not left to chance but rather steered towards foreseeable results.

In essence, [First Name] offers a fusion of seasoned experience, innovative methodologies, and a relentless drive for results. By choosing his [Fractional Executive Company] services, businesses add a transformative business leader to your C-Suite.



Situation Analysis

In today's competitive market, a unified and comprehensive strategy is indispensable for growth. Recognizing the potential inherent in **[Client Company]**, I have discovered the following background information...

Include summary of your findings from the needs of the company...



Objectives

This proposal outlines a robust framework, using the proven experience of **[Fractional Executive Company]**.

Based on our analysis, we have identified the following objectives for **[Client Company]**:

1. **Objective 1** – Short summary
2. **Objective 2** – Short summary
3. **Objective 3** – Short summary

Scope of Work

To achieve the stated objectives, we recommend the following scope:

1. **Key Initiative 1** – Short summary
2. **Key Initiative 2** – Short summary
3. **Key Initiative 3** – Short summary



Recommended Solution

Phase 1: Onboarding (7-14 days)

- Bullet Summary included in this phase
- Bullet Summary included in this phase

Phase 2: 90-Day Strategic Impact Plan (within 30 days)

- Bullet Summary included in this phase
- Bullet Summary included in this phase
- Bullet Summary included in this phase
- Bullet Summary included in this phase

Phase 3: Ongoing Team Department Management (Ongoing)

- Bullet Summary included in this phase
- Bullet Summary included in this phase
- Bullet Summary included in this phase
- Bullet Summary included in this phase

Phase 4: Optimize Resources (Ongoing)

- Bullet Summary included in this phase
- Bullet Summary included in this phase
- Bullet Summary included in this phase
- Bullet Summary included in this phase



Overall Costs

Name of Your Primary Solution (Monthly)	\$7,000
Short description o the primary solution. - XX amount of hours included per week.	
Name of Additional Item 1	\$1,000
Short description o the additional item	
Name of Additional Item 1	\$500
Short description o the additional item	
Travel Costs	\$1,000
Total Cost	\$9,500

Deposit Required: A 50% (\$X,XXX) deposit is required on approval of this proposal.

Next Steps

We are confident that our **[Fractional Executive Company]** Solution will have a significant positive impact on the overall business growth or **[Client Company]**.

To proceed with our partnership, please sign and return the enclosed copy of this proposal. Upon receipt, we will schedule a kickoff meeting to discuss the timeline phases, gather additional information, and set expectations.

Thank you for considering **[Fractional Executive Company]** as your trusted fractional executive partner. We are excited about the opportunity to work together and help **[Fractional Executive Company]** achieve its goals and objectives.

Should you have any questions or require further information, please do not hesitate to contact us. We look forward to hearing from you soon.

Sincerely,

[First Name] [Last Name]

Fractional Executive

[Fractional Executive Company]

www.YourWebsite.com | your.email@email.com

+1 (976) 543-2100



IN CONSIDERATION OF the matters described above and of the mutual benefits and obligations set forth in this Agreement, the receipt and sufficiency of which consideration is hereby acknowledged, the Client and the Fractional Executive (individually the "Party" and collectively the "Parties" to this Agreement) agree as follows:

TERMS OF AGREEMENT

1. The term of this Agreement (the "Term") will begin on the date of this Agreement and will remain in full force and effect until the completion of the Services, subject to earlier termination as provided in this Agreement. The Term may be extended with the written consent of the Parties.
2. In the event that either Party wishes to terminate this Agreement prior to the completion of the Services, that Party will be required to provide 10 days' written notice to the other Party.

PERFORMANCE

The Parties agree to do everything necessary to ensure that the terms of this Agreement take effect.

CURRENCY

Except as otherwise provided in this Agreement, all monetary amounts referred to in this Agreement are in USD (US Dollars).

COMPENSATION

The Fractional Executive will charge the Client an **initial flat fee of \$0.00** and then a **monthly recurring flat fee of \$0.00** for the Services (the "Compensation").

1. A **Deposit if XX%** is payable by the Client upon execution of this Agreement.
2. For the remaining amount, the Client will be invoiced as follows:
 1. **Monthly Recurring**
 1. Invoices submitted by the Fractional Executive to the Client are due upon receipt.
 2. The Compensation as stated in this Agreement does not include sales tax, or other applicable duties as may be required by law. Any sales tax and duties required by law will be charged to the Client in addition to the Compensation.

REIMBURSEMENT OF EXPENSES

1. The Fractional Executive will be reimbursed from time to time for reasonable and necessary expenses incurred by the Fractional Executive in connection with providing the Services.
2. All additional expenses must be pre-approved by the Client.

CONFIDENTIALITY

1. Confidential information (the "Confidential Information") refers to any data or information relating to the business of the Client which would reasonably be considered to be proprietary to the Client including, but not limited to, accounting records, business processes, and client records and that is not generally known in the industry of the Client and where the release of that Confidential Information could reasonably be expected to cause harm to the Client.



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2. The Fractional Executive agrees that they will not disclose, divulge, reveal, report or use, for any purpose, any Confidential Information which the Fractional Executive has obtained, except as authorized by the Client or as required by law. The obligations of confidentiality will apply during the Term and will survive indefinitely upon termination of this Agreement.
3. All written and oral information and material disclosed or provided by the Client to the Fractional Executive under this Agreement is Confidential Information regardless of whether it was provided before or after the date of this Agreement or how it was provided to the Fractional Executive.

OWNERSHIP OF INTELLECTUAL PROPERTY

1. All intellectual property and related material, including any trade secrets, moral rights, goodwill, relevant registrations or applications for registration, and rights in any patent, copyright, trademark, trade dress, industrial design and trade name (the "Intellectual Property") that is developed or produced under this Agreement, is a "work made for hire" and will be the sole property of the Client. The use of the Intellectual Property by the Client will not be restricted in any manner.
2. The Fractional Executive may not use the Intellectual Property for any purpose other than that contracted for in this Agreement except with the written consent of the Client. The Fractional Executive will be responsible for any and all damages resulting from the unauthorized use of the Intellectual Property.

CAPACITY/INDEPENDENT CONTRACTOR

1. In providing the Services under this Agreement it is expressly agreed that the Fractional Executive is acting as an independent contractor and not as an employee. The Fractional Executive and the Client acknowledge that this Agreement does not create a partnership or joint venture between them, and is exclusively a contract for service. The Client is not required to pay, or make any contributions to, any social security, local, state or federal tax, unemployment compensation, workers' compensation, insurance premium, profit-sharing, pension or any other employee benefit for the Fractional Executive during the Term. The Fractional Executive is responsible for paying, and complying with reporting requirements for, all local, state and federal taxes related to payments made to the Fractional Executive under this Agreement.

RIGHT OF SUBSTITUTION

1. Except as otherwise provided in this Agreement, the Fractional Executive may, at the Fractional Executive's absolute discretion, engage a third party sub-contractor to perform some or all of the obligations of the Fractional Executive under this Agreement and the Client will not hire or engage any third parties to assist with the provision of the Services.
2. In the event that the Fractional Executive hires a sub-contractor:
 1. The Fractional Executive will agree with the Client if they are sub-contractor of the Company or the Fractional Executive.
 2. In the event that it is agreed upon between the Client and the Fractional Executive that the Fractional Executive is responsible to pay the sub-contractor, the Fractional Executive will be responsible to pay the sub-contractor to perform duties are required.
 3. For the purposes of the indemnification clause of this Agreement, when the sub-contractor is paid by the Fractional Executive, the sub-contractor is an agent of the Fractional Executive.



AUTONOMY

1. Except as otherwise provided in this Agreement, the Fractional Executive will have full control over working time, methods, and decision making in relation to provision of the Services in accordance with the Agreement. The Fractional Executive will work autonomously and not at the direction of the Client. However, the Fractional Executive will be responsive to the reasonable needs and concerns of the Client.

EQUIPMENT

1. Except as otherwise provided in this Agreement, the Fractional Executive will provide at the Fractional Executive's own expense, any and all equipment, software, materials and any other supplies necessary to deliver the Services in accordance with the Agreement.

NO EXCLUSIVITY

1. The Parties acknowledge that this Agreement is non-exclusive and that either Party will be free, during and after the Term, to engage or contract with third parties for the provision of services similar to the Services.

NOTICE

1. All notices, requests, demands or other communications required or permitted by the terms of this Agreement will be given in writing and delivered to the Parties at the following addresses:

a. _____

b. _____

or to such other address as either Party may from time to time notify the other, and will be deemed to be properly delivered (a) immediately upon being served personally, (b) two days after being deposited with the postal service if served by registered mail, or (c) the following day after being deposited with an overnight courier.

INDEMNIFICATION

1. Except to the extent paid in settlement from any applicable insurance policies, and to the extent permitted by applicable law, each Party agrees to indemnify and hold harmless the other Party, and its respective directors, shareholders, affiliates, officers, agents, employees, and permitted successors and assigns against any and all claims, losses, damages, liabilities, penalties, punitive damages, expenses, reasonable legal fees and costs of any kind or amount whatsoever, which result from or arise out of any act or omission of the indemnifying party, its respective directors, shareholders, affiliates, officers, agents, employees, and permitted successors and assigns that occurs in connection with this Agreement. This indemnification will survive the termination of this Agreement.



MODIFICATION OF AGREEMENT

1. Any amendment or modification of this Agreement or additional obligation assumed by either Party in connection with this Agreement will only be binding if evidenced in writing signed by each Party or an authorized representative of each Party.

TIME OF THE ESSENCE

1. Time is of the essence in this Agreement. No extension or variation of this Agreement will operate as a waiver of this provision.

ASSIGNMENT

1. The Fractional Executive will not voluntarily, or by operation of law, assign or otherwise transfer its obligations under this Agreement without the prior written consent of the Client.

ENTIRE AGREEMENT

1. It is agreed that there is no representation, warranty, collateral agreement or condition affecting this Agreement except as expressly provided in this Agreement.

GOVERNING LAW

1. This Agreement will be governed by and construed in accordance with the laws of the **State of Delaware**.

SEVERABILITY

1. In the event that any of the provisions of this Agreement are held to be invalid or unenforceable in whole or in part, all other provisions will nevertheless continue to be valid and enforceable with the invalid or unenforceable parts severed from the remainder of this Agreement.

WAIVER

1. The waiver by either Party of a breach, default, delay or omission of any of the provisions of this Agreement by the other Party will not be construed as a waiver of any subsequent breach of the same or other provisions.



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AGREEMENT

IN WITNESS WHEREOF the Parties have duly affixed their signatures under hand and seal on this _____ day of _____, _____.

[Fractional Executive Company]

Full Name:

Signature: _____

[Client Company]

Full Name:

Signature: _____