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The Leadership or Management Brand Workshop Proposal

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Leadership/Management Brand Workshop - Project Description

The Leadership Brand Workshop is designed to provide organizations with a systematic and strategic way to create a Leadership Brand Identity that incorporates “Good to Great¹” principles and consists of:

- Target audiences
- Purposes of leadership/management
- What is your Hedgehog Concept? What you are deeply passionate about? What you can be the best in the world at? What drives your resource engine?
- Defining Great – what outputs define great results?
- Key best practices of leadership and their associated specific tangible behaviors and intangible emotional appeal.
 - How do you act with discipline - Turning the Flywheel – to build the brand?
 - Emotional hot buttons to be encouraged and to be avoided
- Getting Right People on the Bus – What are your criteria for selective hiring and appointing?
 - What is Level 5 Leadership at United Centers for Spiritual Living? Key leadership characteristics and beliefs (Level 5 Leadership), and examples of how such characteristics would appear, that speak to your leadership brand or creed.
 - Shared organizational values and the leadership brand archetype
- Positioning statement (short key message on the benefits of management)

Leadership Branding Benefits

- Help leaders, managers, staff, etc. better understand leadership’s purpose and role.
- Establish specific leadership characteristics and best practices along with tangible behaviors to help build a world-class leadership team that is able to produce world-class performance.
- Provide a creed or set of shared beliefs that will provide guidance and structure to leadership evolution.
- Deliver “victory” to all stakeholders.
- Increase the reputation, image, and perceived value of the organizational brand.
- Go from “Good” to “Great!”

You will leave the workshop:

- With a first draft of your Leadership Brand identity map – this is the key deliverable – a short and compelling description of your management brand and the key messages and behaviors to be associated with your brand.
- With consensus to the questions: Who are we? What is our purpose? What select set of best practices should we focus on?
- With a roadmap for strategically communicating your Leadership Brand in the most succinct and persuasive manner.
- With a foundation for implementing and using your Leadership Brand identity.
- With the input needed to potentially conduct market research with your target audiences in order to ensure the Leadership Brand is compelling and credible to them.

Workshop Facilitator

- The Branding Workshop will be personally facilitated and led by Chuck Pettis, President of BrandSolutions, Inc.

Needed Equipment and Food to be provided by Client

- LCD projector and screen.
- Easel, marker pens, note paper, pens, and 3M easel pads.
- To keep everyone’s energy level up, Client to provide drinks and food.

¹ **Good to Great: Why Some Companies Make the Leap...and Others Don’t** by Jim Collins
Good to Great and the Social Sectors: A Monograph to Accompany Good to Great by Jim Collins

- We also recommend that one person be designated as laptop note-taker to capture the information and strategies that come out of the workshop and to check:
- Attendance limited to 15 people to allow everyone to participate fully. If it would be beneficial to include more people in this process, we can facilitate additional workshops.

Cost Estimate

Cost for one-day workshop: \$5,000, plus actual travel expenses.

Cost for 1.5 workshop: \$7,500, plus actual travel expenses.

Notes:

- These costs represent our best estimate, at this time, based on the branding program described above. Because the program may change and alternative or better brand research methods may become apparent as more is learned about the market situation, we reserve the right to jointly modify project descriptions and costs if the project specifications change.
- A 50% initial payment for total project fees and services will be invoiced upon signed contract. The final 50% payment will be invoiced upon completion of the Branding Workshop. All invoices are due and payable within ten (10) days after date of the invoice.
- See Terms & Conditions in Appendix A.

Authorization and Payment Responsibility

The undersigned is duly authorized to sign on behalf of the Client, rendering Client responsible for the faithful and complete performance of the foregoing agreement, including the prompt payment of amounts due thereunder.

Agreed and Accepted:

For the Client:

Signed by: _____

Title: _____ Date: _____

Appendix A — Terms & Conditions

1. Client retains BrandSolutions, Inc. (Consultant) to perform strategic market research, brand consulting, and creative work as identified by both parties. Consultant shall act at all times herein as independent contractor, and nothing contained herein shall be construed to create the relation of principal and agent or employer and employee, between Client and Consultant.
2. The Client will be provided a written description and cost estimate on projects which, when signed by the Client, authorizes the Consultant to perform the services described. If the project specifications change during the project, the Consultant will notify the Client of the changes and price adjustments that may be needed. Upon approval of the changes, the Consultant will be authorized to continue with the project. The Client may also, from time to time, verbally authorize the Consultant to perform services.
3. Consultant and Client agree that project costs may vary, but will not exceed the total of approved estimates, plus any approved changes and applicable sales taxes, by more than 10 percent.
4. Travel: Because we travel frequently and respect our employee's health, we reserve the right to make travel arrangements that are convenient for our employees. On international flights, we reserve the right to travel Business or equivalent class.
5. The Client-Consultant relationship shall commence on the date this proposal is signed and continue in force until terminated by either party. In the event that either party desires to end the Client-Consultant relationship, the party wishing to terminate the agreement shall notify the other party by letter via registered mail. Termination becomes effective ninety (90) days from receipt of the termination notice. The Client agrees to pay Consultant fees and all other charges for services rendered up to and through the 90-day period.
6. In performing its obligations hereunder, Consultant will purchase goods and services from third parties. To ensure highest quality standards of production, Consultant reserves the right to select all vendors performing components of Consultant jobs. In order for Consultant to pay those third parties in a timely fashion and to maintain the excellent relationships on which Consultant relies to deliver timely quality services to Client, it is essential to collect from Client all amounts owed in a timely fashion. A 50% initial payment for total project fees and services will be invoiced upon signed contract. The final 50% payment will be invoiced upon completion of the Branding Workshop. All invoices are due and payable within ten (10) days after date of the invoice. In the event invoices are not paid within sixty (60) days, the Consultant may immediately stop work on all projects.
7. Indemnification: The Consultant agrees to exercise its best judgment in the counseling and consulting regarding brand identity, brand strategy and marketing communications, with a view to avoid all claims, proceedings, or suits being made or instituted against the Client or Consultant. It is mutually agreed, however, that Client will defend, indemnify and hold the Consultant, its officers, directors, agents and employees, harmless against any loss sustained as a result of any claim, proceeding or suit based upon assertions made for any of the Client's products or services or any of the products or services of any of the Client's competitors in any advertising or marketing communications which may be prepared as a result of the workshop and any consulting or counseling.
8. Arbitration: If any dispute arises concerning the performance, interpretation or enforcement of this Agreement, the parties hereto agree that such matter shall be determined by arbitration, upon the written request of one party given to the other. Such arbitration shall be conducted in King County, Washington State and shall be in accordance with the Northwest Region Expedited Commercial Arbitration Rules of then Arbitration Association then in effect. Any award under such arbitration, including any award for damages, may be entered in any court having jurisdiction thereof. In the event of any litigation or arbitration under this Agreement, including all appeals, petitions, or reviews, the prevailing party shall be entitled to reasonable attorney's fees and costs in addition to other relief.
9. This agreement shall be governed by and construed in accordance with the laws of the State of Washington.