

Proposal WEC Web Design and Training - Gavin Julyan

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Proposal

Web Design and Web Development Team Training

for



written by

Gavin Julyan

Purpose

There are two purposes

1. **DESIGN THE INFRASTRUCTURE FOR A SCALABLE, INTERNATIONAL MEMBERSHIP SITE.**
2. **TRAIN AN INTERNAL WEB DEVELOPMENT TEAM TO MAINTAIN AND IMPROVE THE WEB SITE AFTER THE INITIAL DESIGN IS COMPLETE.**

During our initial meeting, we established that the web site should be secure, easy to maintain and capable of collecting member information via events, an embedded form, or by direct data input, and store this data on a secure database and allow chosen and trained ambassadors to communicate with members assigned to their care.

A secure, and easy to maintain, site

Web hosting that is both secure and easy to maintain can be obtained at A2Hosting where their WordPress Elementor hosting option is both good value for money and includes some incredible features. Have a look at the following pages –

- [Hosting prices.](#)
- [Hosting features.](#)

Member information

Obtaining and maintaining member information would demand either the use, or creation, of a comprehensive CRM system that incorporates sophisticated marketing, sales, service (*help desk*) and operations tools.

Fortunately you will not have to create such software because it already exists and has a 100% free version that will allow WEC to comprehensively test the effectiveness of the tools.

Details of the software can be found on the following web pages –

- [What's included in the free version.](#)
- [Cloud infrastructure, data hosting and GDPR.](#)

I have utilised this software for many years in many organisations and have had no need to upgrade to a paid version.

International payment gateways

Specialised online “banks” (*like PayPal*) that allow an ecommerce solution for membership fees are very few and discussions will be needed with payment gateway suppliers to determine their international coverage.

Until an appropriate payment gateway supplier is found, simple EFT options will work. This however, demands a lot of administration and is a stumbling block to effective automation of the take-on of members.

See what [PayPal have recently added on their App Center](#). I have not used these.

Events grow members

By organising and promoting a physical or virtual event that has a specific, deadline date, to which you can invite participants either as guests or paid delegates, creates an environment that focuses everyone's attention on populating the event and makes marketing your organisation, with the event as a clear stepping-stone, easier.

My preferred platform for organising and managing events has very useful information on the following pages –

Strategy

Four focus areas

The timeline of activities which we believed could be achieved by the 4th March 2022 will focus on the four major areas –

- **Secure, cost effective hosting** – moving to A2Hosting and training on Elementor as a web builder.
- **State of the art CRM system** – Setup and onboarding training on the CRM system.
- **Choosing a payment gateway** – Service provider must provide an international solution.
- **Growing through events** – Setup and training on use of events platform.

Incorporating existing marketing activities

Your existing marketing activities must continue particularly if it is currently working.

We'll add tracking to your existing marketing once everything is in place and keep the successful strategies.

Marketing and events planning calendar

Unless marketing and events are on a published timetable and occur on an ongoing and regular basis, then your membership growth will become erratic and eventually falter.

Management involvement in growth

Senior management has better, and more direct, access to influential individuals who head up other networks and organisations.

This warrants special training to the senior members of WEC to allow them to leverage their contacts by using the systems we have put in place.

WEC management needs to support the following philosophy –

One of the most important forms of membership is Free Membership with access to free promotional training material, because this allows for the quick growth of an organisation and gives ambassadors a pool of prospects to convert to paid membership.

This logic should extend to regular periodic free events to which everyone, including the general public, is invited.

Plan of Action

About this plan

This is the light version of the timeline. It's high level but there's a lot to each of these elements and there's a lot that's not mentioned.

If it turns out that something unexpected happens that is producing better than expected results, it would be crazy not to milk it.

This will all be in consultation with yourself but we're not going to just operate blindly and carry out this plan regardless of results.

Week by week

11th February 2022 – Project and training plan in writing and added to the project management system.

18th February 2022 – Website pages in place, CRM forms embedded in web pages and landing pages (*for marketing*) done.

25th February 2022 – CRM working and training on CRM complete. Marketing calendar created.

4th March 2022 – Hand over project.

Scope of This Project

What is Scope Creep?

Scope creep

(sometimes known as “requirement creep” or even “feature creep”) refers to how a project's requirements tend to increase over a project lifecycle, e.g., what once started as a single deliverable becomes five; or a product that began with three essential features, now must have ten; or midway through a project, the customer's needs change, prompting a reassessment of the project requirements. Scope creep is typically caused by key project stakeholders changing requirements or sometimes by internal miscommunication and disagreements.

Scope creep is not always a bad thing because change is inevitable and customer needs evolve over time and delivering a project that answers your needs often means altering the scope.

How to Control and Avoid Scope Creep

It is essential that you speak to me directly if you believe that there is something more needed on the project, because I have found that scope creep often occurs because the customer does not have sufficient knowledge about the functionality and capabilities of the systems created and put in place for the project.

The Golden Rule

Only items listed in this document have been included in the budget and any additional requirements or changes to the project will be seen as additional projects for which a new proposal is required.

Your Investment

We're a little different from the others

We don't operate on full payments which means that you pay weekly for the duration of the deal. You'll never be "out of pocket".

Description	Units	Rate	Total
Implementation and Training	25 hours	R 1 250.00	R 31 250.00
Additional Online Meetings	per meeting	R 750.00	R 750.00

The deal

Payment Schedule

- 11 February 2022 – R 5 000.00
- 28 February 2022 – R 5 350.00
- 31 March 2022 – R 10 500.00
- 29 April 2022 – R 10 400.00

All of the Invoices will be sent to you by 11th February 2022, but each will have a different due date.
That's it!

This is a R 31 250.00 decision and you need to be comfortable with that.

With us around you may spend more money on guest speakers for your events and paid social media marketing, once you see that things are working.

We charge extra for additional online meetings because we organise enough of them to ensure that we are constantly in contact and you are aware of what is happening.

*We give you the ability to invoke the **guarantee (see below) or cancel at any time if you feel that things are not going in the direction of the planning.***

Guarantee

A free week every time we miss a weekly deadline

We do not guarantee that everything will work the first time. To suggest this is insulting to your intelligence. We do however have a guarantee which means if things aren't going to plan then you don't lose out.

Here's how it works

As long as you've been supplying us with everything we need and living up to your end of the bargain and we're simply not hitting deadlines then we will extend your deal at no cost to you by an extra week.

In essence, if we're late every week for 4 weeks, you'd get another 4 weeks

free. If we're late on 1 of the weeks then you'd get 5 weeks instead of 4.

We do this to put pressure on ourselves to meet the deadlines we both agreed to. It also gives you peace of mind that in the event that we don't do exactly what we say we'll do, then you get us working until it does.

Next Steps

We start today

It goes without saying that we'd love to get started and have you onboard as a client. As with everything in our business, we make things as simple as possible.

Just so you know, these are the next steps:

Sign below

Before we get started you need to sign our proposal.

To do that, simply complete the details below and click '**Accept**'.

1. We'll invoice you for your first week. Pay this by the 11th February 2022.
2. We'll develop and add the project and training plan to the project management system to which your project team has full access.
3. We'll do the initial setup of the CRM system and invite your chosen staff members to this system.

We can't wait to start showing the results to you as soon as possible to verify that you made the right decision.

Terms and Conditions

This Agreement (the "Agreement") is made as of the date this proposal was accepted, by and between World Economic Congress (the "Company"), and Gavin Julyan ("Consultant").

1. Consulting Relationship.

During the term of this Agreement, Consultant will provide consulting and training services to the Company as described above (the "Services"). Consultant represents that

Consultant has the qualifications, the experience and the ability to properly perform the Services. Consultant shall use Consultant's best efforts to perform the Services such that the results are satisfactory to the Company.

2. Fees.

As consideration for the Services to be provided by Consultant and other obligations, the Company shall pay to Consultant the amounts specified herein at the times specified.

3. Expenses.

Consultant shall not be authorized to incur on behalf of the Company any expenses and will be responsible for all expenses incurred while performing the Services unless otherwise agreed to by the Company, which consent shall be evidenced in writing. As a condition to receipt of reimbursement, Consultant shall be required to submit to the Company reasonable evidence that the amount involved was both reasonable and necessary to the Services provided under this Agreement.

4. Term and Termination.

Consultant shall serve as a consultant to the Company for a period commencing on the date this proposal was accepted and terminating on the earlier of –

(a) the date Consultant completes the provision of the Services to the Company under this Agreement, or

(b) the date Consultant shall have been paid the maximum amount of consulting fees.

Notwithstanding the above, either party may terminate this Agreement at any time upon written notice. In the event of such termination, Consultant shall be paid for any portion of the Services that have been performed prior to the termination.

Should either party default in the performance of this Agreement or materially breach any of its obligations under this Agreement, including but not limited to Consultant's obligations under the Confidential Information Agreement between the Company and Consultant. The non-breaching party may terminate this Agreement immediately if the breaching party fails to cure the breach within 2 business days after having received written notice by the non-breaching party of the breach or default.

5. Independent Contractor.

Consultant's relationship with the Company will be that of an independent contractor and not that of an employee.

6. Method of Provision of Services.

Consultant shall be solely responsible for determining the method, details and means of performing the Services. Consultant may, at Consultant's own expense, employ or engage the services of such employees, subcontractors, partners or agents, as Consultant deems necessary to perform the Services (collectively, the "Assistants"). The Assistants are not and shall not be employees of the Company, and Consultant shall be wholly responsible for the professional performance of the Services by the Assistants such that the results are satisfactory to the Company.

6.1 No Authority to Bind Company. Consultant acknowledges and agrees that Consultant and its Assistants have no authority to enter into contracts that bind the Company or create obligations on the part of the Company without the prior written authorization of the Company.

6.2 No Benefits. Consultant acknowledges and agrees that Consultant and its Assistants shall not be eligible for any Company employee benefits and, to the extent Consultant otherwise would be eligible for any Company employee benefits but for the express terms of this Agreement, Consultant (on behalf of itself and its employees) hereby expressly declines to participate in such Company employee benefits.

6.3 Withholding; Indemnification. Consultant shall have full responsibility for applicable withholding taxes for all compensation paid to Consultant or its Assistants under this Agreement, and for compliance with all applicable labour and employment requirements with respect to Consultant's self-employment, sole proprietorship or other form of business organization, and with respect to the Assistants, including worker's compensation coverage requirements. Consultant agrees to indemnify, defend and hold the Company harmless from any liability for, or assessment of, any claims or penalties with respect to such withholding taxes, labour or employment requirements, including any liability for, or assessment of, withholding taxes imposed on the Company by the relevant taxing authorities with respect to any compensation paid to Consultant or its Assistants.

7. Supervision of Consultant's Services.

All of the services to be performed by Consultant, including but not limited to the Services, will be as agreed between Consultant and the Company. Consultant will be required to report weekly to the Company concerning the Services performed under this Agreement. The nature of these reports will be left to the discretion of the Consultant.

8. Consulting or Other Services for Competitors.

Consultant represents and warrants that Consultant does not presently perform or intend to perform, during the term of the Agreement, consulting or other services for, or engage in or intend to engage in an employment relationship with, companies who businesses or proposed businesses in any way involve products or services which would be competitive with the Company's products or services. If, however, Consultant decides to do so, Consultant agrees that, in advance of accepting such work, Consultant will promptly notify the Company in writing, specifying the organization with which Consultant proposes to consult, provide services, or become employed by and to provide information sufficient to allow the Company to determine if such work would conflict with the terms of this Agreement, including the terms of any Confidentiality Agreement, the interests of the Company or further services which the Company might request of Consultant. If the Company determines that such work conflicts with the terms of this Agreement, the Company reserves the right to terminate this Agreement immediately. In no event shall any of the Services be performed for the Company at the facilities of a third party or using the resources of a third party.

9. Confidentiality Agreement.

Consultant agrees that he will not disclose any confidential information about the Company's financial position, staff, suppliers or members to anyone at any time without the express written permission of the Company.

10. Conflicts with this Agreement.

Consultant represents and warrants that neither Consultant nor any of the Assistants is under any pre-existing obligation in conflict or in any way inconsistent with the provisions of this Agreement. Consultant represents and warrants that Consultant's performance of all the terms of this Agreement will not breach any agreement to keep in confidence proprietary information acquired by Consultant in confidence or in trust prior to commencement of this Agreement. Consultant warrants that Consultant has the right to disclose and/or use all ideas, processes, techniques and other information, if any, which Consultant has gained from third parties, and which Consultant discloses to the Company or uses in the course of performance of this Agreement, without liability to such third parties. Notwithstanding the foregoing, Consultant agrees that Consultant shall not bundle with or incorporate into any deliveries provided to the Company herewith any third party products, ideas, processes, or other techniques, without the express, written prior approval of the Company. Consultant represents and warrants that Consultant has not granted and will not grant any rights or licenses to any intellectual property or technology that would conflict with Consultant's obligations under this Agreement. Consultant will not knowingly infringe upon any copyright, patent, trade secret or other property right of any former client, employer or third party in the performance of the Services.

11. Miscellaneous.

11.1 Amendments and Waivers. Any term of this Agreement may be amended or waived only with the written consent of the Company.

11.2 Sole Agreement. This Agreement, constitutes the sole agreement of the parties and supersedes all oral negotiations and prior writings with respect to the subject matter hereof.

11.3 Notices. Any notice required or permitted by this Agreement shall be in writing and shall be deemed sufficient upon delivery, when delivered personally or by overnight courier or sent by email (upon customary confirmation of receipt).

11.4 Choice of Law. The validity, interpretation, construction and performance of this Agreement shall be governed by the laws of the Republic of South Africa, without giving effect to the principles of conflict of laws.

11.5 Severability. If one or more provisions of this Agreement are held to be unenforceable under applicable law, the parties agree to renegotiate such provision in good faith. In the event that the parties cannot reach a mutually agreeable and enforceable replacement for such provision, then –

11.5(i) such provision shall be excluded from this Agreement.

11.5(ii) the balance of the Agreement shall be interpreted as if such provision were so excluded.

11.5(iii) the balance of the Agreement shall be enforceable in accordance with its terms.

EACH PARTY ACKNOWLEDGES THAT THEY HAVE READ AND UNDERSTOOD ALL OF THE TERMS AND PROVISIONS OF THIS AGREEMENT.

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