

# Consulting Services Quote Template

QUOTE REFERENCE: [QUOTE-001]

DATE ISSUED: [DD/MM/YYYY]

VALID UNTIL: [DD/MM/YYYY]

## YOUR FIRM / CONSULTANT DETAILS

**Name / Firm:** [YOUR NAME OR FIRM NAME]

Address: [ADDRESS LINE 1]

[ADDRESS LINE 2]

[CITY, POSTCODE]

Phone: [YOUR PHONE NUMBER]

Email: [YOUR EMAIL ADDRESS]

Website: [YOUR WEBSITE]

VAT Number: [YOUR VAT NUMBER (if applicable)]

## CLIENT DETAILS

**Client Name:** [CLIENT COMPANY NAME]

Contact Name: [CONTACT PERSON NAME / SPONSOR]

Address: [CLIENT ADDRESS LINE 1]

[CLIENT ADDRESS LINE 2]

[CITY, POSTCODE]

Email: [CLIENT EMAIL ADDRESS]

Phone: [CLIENT PHONE NUMBER]

## ENGAGEMENT OVERVIEW

## Engagement Title: [NAME OF ENGAGEMENT]

Background:

[Brief description of the client's situation, the challenge or opportunity being addressed, and how this engagement will help them achieve their goals.]

Objectives:

1. [Primary objective]
2. [Secondary objective]
3. [Additional objective if applicable]

Engagement Type:  Advisory / Strategy  Implementation  Review

Engagement Period: [START DATE] to [END DATE] (approx. [X] weeks / months)

## ENGAGEMENT PHASES & WORKSTREAMS

Phase	Description	Days	Day Rate	Amount
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<b>1</b>	<b>[e.g. Discovery &amp; Stakeholder</b>	<b>[X]</b>	<b>[£X/day]</b>	<b>[£XXX]</b>
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Interviews]

2	[e.g. Current State Assessment]	[X]	[£X/day]	[£XXX]
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3	[e.g. Strategy Development &	[X]	[£X/day]	[£XXX]
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Recommendations]

4	[e.g. Implementation Planning]	[X]	[£X/day]	[£XXX]
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5	[e.g. Facilitated Workshops (x[N])]	[X]	[£X/day]	[£XXX]
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6	[e.g. Final Report & Presentation]	[X]	[£X/day]	[£XXX]
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7	[e.g. Post-Engagement Support]	[X]	[£X/day]	[£XXX]
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Total consulting days: [X] days

Day rate applies to: [Consultant name / grade if multiple rates used]

Key deliverables:

- [e.g. Stakeholder interview summary]
- [e.g. Current state report]
- [e.g. Strategic recommendations paper]
- [e.g. Implementation roadmap]

- [e.g. Executive presentation]

## EXPENSES

Item	Description	Estimated Cost
<b>Travel</b>	<b>[e.g. Rail/flights to client site]</b>	<b>£[AMOUNT]</b>
Accommodation	[e.g. X nights at client location]	£[AMOUNT]
Subsistence	[e.g. Meals during on-site days]	£[AMOUNT]
Other	[e.g. Printing, courier, software]	£[AMOUNT]

**Total Expenses:** **£[TOTAL]**

Note: Expenses will be invoiced at cost with receipts provided.

Expenses exceeding estimated total require prior written approval.

## COST SUMMARY

**Consulting fees (ex. VAT):** **£[SUBTOTAL]**

Estimated expenses (ex. VAT): £[EXPENSES]

**Subtotal (ex. VAT):** **£[COMBINED]**

VAT @ 20%: £[VAT AMOUNT]

**TOTAL ESTIMATED (inc. VAT):** **£[TOTAL]**

## PAYMENT TERMS

### Payment schedule:

- [X]% on engagement commencement: £[AMOUNT]
- [X]% on completion of Phase [X]: £[AMOUNT]
- [X]% on delivery of final report: £[AMOUNT]

Alternatively, monthly invoicing on a [time and materials] basis may be agreed — please discuss at point of acceptance.

Payment method: [Bank transfer]

Bank details: [SORT CODE: XX-XX-XX | ACCOUNT: XXXXXXXXX]

Payment due: [Net 30] days from invoice date

Expenses invoiced monthly in arrears with supporting receipts.

## ADDITIONAL NOTES

### - This quote is valid for [30] days from the date of issue.

- Day rate assumes an [8]-hour working day. Significant out-of-hours work may be subject to a premium rate by mutual agreement.
- Client to ensure availability of key stakeholders for interviews and workshops as agreed in the project plan.
- Engagement may be paused or extended by mutual agreement in writing.
- Confidentiality: All information shared by the client will be treated as strictly confidential in accordance with [YOUR FIRM]'s standard NDA.

## ACCEPTANCE

**To accept this quote, please sign below or reply in writing to confirm.**

Signed (Client): \_\_\_\_\_ Date: \_\_\_\_\_

Name (print): \_\_\_\_\_

Position: \_\_\_\_\_

Thank you for your business — [YOUR NAME / FIRM NAME]

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