



**William George Associates (WGA)
2022/2023 Small Business Support Services**

ALL SMALL BUSINESSES ARE ESSENTIAL!!

WGA is pleased to offer Essential Small Business Annual Support services for strategic planning and project execution, IT troubleshooting, and game-changing training. Nothing happens without a plan, tracking the plan, and changing the plan as market forces change. WGA is expert in providing affordable project management services for the benefit of Small Businesses, all of which we know are ESSENTIAL!

Here are the items covered by the support agreement:

Included Services
2022/2023 Strategic Planning
WGA PM documents your strategy for 2022/2023 (we will be successful if we accomplish X, Y, Z)
WGA PM captures projects and high-level tasks that support the strategic plan
WGA PM creates project schedules for strategic projects in Microsoft Project Online*
WGA PM collects weekly progress on key project tasks from the client via email
WGA PM updates project progress (% complete) in the schedules
WGA PM/Business Owner holds weekly project status meeting with the client
WGA PM captures and publishes meeting minutes, action items, issues, and progress reports
*-no investment in software is needed by the client
Other included Services
IT support for Business Owner and family members
\$30,000 in training, 100% reimbursed via MA-WTF for companies of 100 employees or fewer
\$15,000 in training reimbursed for \$30,000 in training for companies larger than 100 employees
Small Business Exchange
WGA will promote the goods and services of all Small Businesses with Support Agreements to all other members in the WGA support community

CLIENT PRIVILEGED INFORMATION

Note: All information shared with WGA is handled with the highest degree of care. All information shared resultant from the Support Agreement is treated as *Confidential* and *Privileged*, and will never be shared with anyone including and especially the State and Federal government.

Costs and Terms and Conditions

- WGA Small Business annual support agreements cost \$995.00/month due on the 1st day of each month via autopay;
- Upon receipt of initial payment, WGA will assign the client a dedicated Project Manager;
 - The PM will initiate a remote session to capture critical information of the client regarding the strategic plans of the client;
 - The PM and client will schedule weekly status meetings the client;
- The support agreement includes 6 hours of WGA support per month. If usage exceeds the monthly limit, the client may apply future unused planned hours to the overage. Once all future hours are expended the client may remit payment for the additional hours at \$195/hour when the next month's payment is due, or establish a new annual agreement at that point for \$995/month.
- WGA will work with the client to gain approval for training and subsequent WTF reimbursement. There is a simple process to be followed which we are happy to explain anytime. Please indicate your acceptance of this agreement by signing below. Thank you!

Accepted and Approved for

Business Name
Street Address
City, State Zip Code

Accepted and Approved for

William George Associates, Ltd.
99 South Bedford St., Suite #102
Burlington, MA 01803

Signature

Signature

Name (Print)

Mark C. Hall

Name (Print)

Title

President

Title

Date

Date