

[Consultant Name/Firm Name]

[Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Date]

[Client Name]

[Client Title]

[Company Name]

[Address]

[City, State, Zip Code]

Re: Proposal for Key Personnel Retention and Succession Planning Services

Dear [Client Name],

This letter outlines the proposal for [Consulting Firm Name] to provide professional consulting services to [Company Name] regarding key personnel retention and leadership succession planning.

1. Objectives

The primary goals of this engagement are to identify critical roles within the organization, develop strategies to retain top talent, and create a formal roadmap for leadership transitions to ensure long-term business continuity.

2. Scope of Services

Our approach will include the following phases:

- **Risk Assessment:** Identifying key positions and evaluating the impact of potential departures.
- **Retention Strategy:** Developing specialized incentive programs, professional development paths, and engagement initiatives.
- **Succession Mapping:** Identifying internal high-potential candidates and performing gap analyses on their readiness.
- **Knowledge Transfer:** Creating formal processes to capture institutional knowledge from senior leaders.

3. Deliverables

At the conclusion of this project, [Company Name] will receive:

- A Comprehensive Key Personnel Risk Report.
- A Customized Retention Framework (including compensation and non-monetary recommendations).
- A Formal Succession Plan for [Number] identified leadership roles.

4. Timeline and Fees

The estimated duration for this project is [Number] weeks/months. The professional fee for these services is [Amount], payable according to the following schedule: [Payment Terms].

5. Confidentiality

All data and personal information regarding employees and company strategy will be held in the strictest confidence.

If this proposal meets your requirements, please sign below to authorize the commencement of work.

Sincerely,

[Consultant Signature]

[Consultant Name]

[Title]

Authorization:

Accepted by: _____ Date: _____

[Client Name], [Title]