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***SharedKnowledge*<sup>™</sup> Assessment  
Santa Energy**

Presented to:

**Tom Santa  
Santa Energy**

154 Admiral Street  
Bridgeport, CT  
06605

Presented by:

**Shared Results International**  
One Grove Street, 201D  
Pittsford, NY 14534

November 3, 2003

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## Client Request

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Shared Results International has been asked to conduct a *SharedKnowledge*™ Assessment for the employees of Santa Energy. The objective is to gather leadership and communications insight and data from management and employees. The information from this assessment can be used to develop a strategic action plan to address the critical success factors. The ultimate goal of the assessment is to have the company uniquely positioned for faster growth and higher productivity.

## Assessment Description

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### Phase I – Preparation

Shared Results International (SRI) will review Santa Energy background and business materials, plan the approach with HR Manager, and conduct research in the energy distribution industry.

### Phase II – Assessment

SRI will interview the senior management team members individually, hold 2-4 employee roundtables and conduct a company-wide leadership / communications survey.

### Phase III – Analysis

SRI will review all input from interviews, roundtables, and survey information. Data will be collated, sorted and analyzed. Patterns, trends and key messages will be identified. Critical success factors will be articulated. Action plan recommendations will be developed.

### Phase IV – Report

SRI will present the findings, recommendations and critical success factors to the senior team in both report and PowerPoint form and will facilitate a discussion and clarification of all items.

NOTE: Please see the attached document (Step by Step Responsibilities) for more details.

## Tasking, Schedule and Cost

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Phase	Task	Time	Cost
I	Preparation	Nov 10 – 15	\$ 490
II	Assessment	Nov 17 – Dec 15	\$ 2,190
III	Analysis	Dec 15 – Jan 5	\$ 1,245
IV	Report	Jan 7-16	\$ 625
<b>TOTAL</b>			<b>\$ 4,550 *</b>

\*Plus Expenses: Shared Results International makes every effort to minimize expenses. This project anticipates three trips not to exceed \$450 each.

## Terms and Conditions

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- Quoted contract amounts are good for 30 days.
- Adjustments to contracts to be made in writing and pre-approved by both client and Shared Results International prior to implementation.
- A deposit of 49% is required on all projects and training sessions above \$1000.
- Terms: 1% - 14 days: Net 30. 18% (annual percentage rate) on unpaid balances beyond thirty days.

## Guarantee

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We guarantee that you will be absolutely delighted with the final product, the interaction that we have with your people, and the smooth and efficient processes that we employ. Final payment is totally contingent on your complete satisfaction.

### CLIENT ACCEPTANCE

Signed \_\_\_\_\_ Title \_\_\_\_\_ Date \_\_\_\_\_  
*Santa Representative*