



Strategic Retainer Partnership

PARTNERSHIP VALUE

Why a Retainer Partnership?

Unlike project-based engagements that begin and end in isolation, retainers create sustained strategic relationships embedded in your organisational context.

Strategic Continuity

Carlorbiz becomes embedded in your organisational context, understanding nuances that drive better decision-making and more effective solutions across every engagement.

Guaranteed Availability

Priority scheduling and protected time allocation. When urgent issues arise, you have immediate access to expertise without competing for availability or waiting for project scoping.

Predictable Investment

Fixed monthly fees eliminate budget surprises and enable accurate financial planning. Know precisely what strategic support costs each month.



HOW IT WORKS

Additional Partnership Benefits

Flexible Resource Allocation

The hour-banking system accommodates natural workflow fluctuations. Light months can bank hours for intensive periods, ensuring full value from your investment whilst deploying consultancy time when most needed.

Performance-Based Delivery

Many retainer arrangements operate on deliverable-based rather than hourly timesheet models – covering Board reporting, strategic oversight, and communications review rather than administrative hour tracking.

Upfront Payment Bonus Hours

Clients who prepay their annual retainer receive bonus hours at no additional cost:

- 10-hour packages: **5 bonus hours** annually
- 20-hour packages: **10 bonus hours** annually
- 30+ hour packages: **20 bonus hours** annually

Priority Booking Rights

Clients with **30+ hour monthly retainers** receive first-right-of-refusal for contract renewal, ensuring continuous access to preferred consultant availability for subsequent contract years.

Rate Protection

Banked hours remain at your contracted rate throughout the banking period, protecting your investment even if standard rates increase during your contract term.

Five Simple Steps to Get Started

1

Choose Your Tier

Select based on anticipated monthly requirements

2

Lock in Pricing

Execute contract by 30 June 2026 for EOFY Special rates, or any time after July 1 for "standardly premium" annual bundle benefits

3

Define Deliverables

Collaborative annual planning ensures alignment

4

Bank Unused Hours

Flexibility for busy periods or specific projects

5

Scale as Needed

Adjust with 30 days notice subject to availability



☆ LIMITED TIME OFFER

EOFY Special – Contracts by 30 June 2026

Contracts signed and first two months prepaid by **30 June 2026** receive exceptional end of financial year pricing with discounts up to **20% off standard 2026 rates**.

20%

Maximum Discount

80-hour monthly packages save up to 20% annually

\$25,920

Annual Savings

On an 80-hour EOFY Special annual commitment

30 Jun

Hard Deadline

Contract execution and 2 months prepayment required

⚠ EOFY Special requires contract execution and two months prepayment by 30 June 2026. All pricing excludes GST.

EOFY Annual Commitment Pricing

Lock in enhanced discounts for 12-month commitments before 30 June 2026. All pricing excludes GST.

Monthly Hours	Monthly Fee	Hourly Rate	Annual Saving
20 hours	\$2,430.00	\$121.50/hr	10% discount
40 hours	\$4,590.00	\$114.75/hr	15% discount
80 hours	\$8,640.00	\$108.00/hr	20% discount

Standard Short-Term (3 or 6 Months, Prepaid)

All tiers: **\$128.25/hour** (5% discount). Requires full contract prepayment any time through 2026.

EOFY Special Short-Term

- 10–30 hours: **\$125/hour**
- 40–50 hours: **\$115/hour**

Contract and prepayment required by 30 June 2026. All pricing excludes GST.



Standard Retainer Pricing

For contracts commencing **1 January 2026** or later. Standard retainer pricing provides substantial savings of **5-20% off** the ordinary hourly rate of \$135 +GST.

Monthly Hours	Monthly Fee	Hourly Rate	Annual Saving
40 hours	\$5,130.00	\$128.25/hr	5% discount
60 hours	\$7,290.00	\$121.50/hr	10% discount
80 hours	\$9,180.00	\$114.75/hr	15% discount
120 hours	\$12,960.00	\$108.00/hr	20% discount

Hour Banking

Unused hours rolled over or applied to larger projects

Priority Booking

Guaranteed preferred scheduling for your projects

Flexible Allocation

Adapt hours to suit varying project needs throughout the 12-month contract

All pricing excludes GST. Annual commitments offer the deepest discounts and most comprehensive benefits.

Additional Hour Bundles

Standalone Packages

Bundles of 10, 20, 30, 40 or 50 hours at **5% discount** off standard rate. Available for existing clients or one-off project requirements. Must be purchased and scheduled in advance.

Retainer Add-On Bundles

Annual retainer clients can purchase additional hour bundles at their **contracted discount rate** when pre-arranged to ensure consultant availability.



Hour Banking & Flexibility

Standard Retainers

Unused hours accumulate for up to **three months**, providing flexibility for natural workflow variations. Extensions to **six months** are available with four weeks notice and documented project allocation.

Project-Based Arrangements

For clients with defined future projects, retainer hours can be banked specifically for project delivery, with appropriate buffer allocation for pre-project scoping and post-delivery support.

Hour Rollover Post-Contract

Banked hours remain available for **28 days** following contract expiry. Condensed delivery periods require four weeks notice and are subject to consultant availability.

Performance-Based Delivery Model

Rather than traditional hourly tracking, many retainer relationships operate on agreed deliverables — focusing on outcomes and strategic value rather than administrative time tracking.

Typical deliverables include:

- Regular facilitation of workshops
- Quarterly strategic reviews and Board reporting
- Monthly communications audits and recommendations
- Fortnightly check-ins and strategic guidance
- Ad hoc consultation within scope parameters

Real-World Applications

Business Development

Challenge: A technology startup requires support with business development and funding opportunities.

Solution: 30-hour monthly retainer with flexible delivery covering business development strategies, pipeline management, team and Board consultations, plus grant writing and strategic partnership negotiations.

Leadership Transition

Challenge: A national organisation requires strategic oversight during CEO transition.

Solution: 60-hour monthly retainer providing bi-weekly interim leadership meetings, strategic planning for advocacy priorities, Board reporting and stakeholder communications, plus market analysis and competitive positioning.

Digital Transformation

Challenge: A professional services firm needs comprehensive preparation of people and systems ahead of a planned digital transformation.

Solution: 80-hour monthly retainer with project-focused hour banking for team consultation, educational delivery and resource development — banking 120 hours for an intensive 6-week period.



Frequently Asked Questions

Can I adjust my retainer level during the contract period?

Yes, retainer levels can be adjusted with **30 days notice**, subject to consultant availability. Adjustments may affect your discount tier and will be reflected in subsequent monthly billing.



What happens if I don't use all my hours in a given month?

Unused hours accumulate for up to **three months** in standard retainers. Hours can be banked for longer periods when tied to specific projects with appropriate advance notice and documentation.



Can I pause my retainer temporarily?

Temporary pauses require **30 days notice** and must be approved based on consultant availability and existing client commitments. Paused retainers may affect priority booking rights.



How do you handle scope creep or additional requirements?

All retainers operate within agreed scope parameters detailed in annual project plans. Significant scope changes are discussed collaboratively, with additional hours drawn from banked allocations or purchased as supplementary bundles at contracted rates.



What if I need more hours than my retainer provides?

Additional hours can be purchased at your **contracted discount rate** when pre-arranged, or at standard rates for urgent requirements. Discuss anticipated busy periods during annual planning to ensure adequate hour allocation.



How do you ensure confidentiality across multiple clients?

All retainer relationships operate under **strict confidentiality agreements**. Information sharing between clients occurs only with explicit written consent and is typically limited to non-competitive industry insights or methodological approaches.



Key Terms and Conditions

Payment Terms

- Annual retainers: Monthly billing in advance
- Short-term retainers: Full prepayment required
- EOFY Special: 2 months prepayment by 30 June 2026
- All invoices payable within 14 days

Termination Policy

- Four weeks written notice required
- Early termination triggers sliding scale discount recoupment
- Hours recalculated at tier rate corresponding to actual delivery

Investment Protection

- Professional indemnity insurance
- Comprehensive confidentiality agreements
- Rate protection on banked hours during contract period

⚠ Critical Deadline: EOFY Special expires **30 June 2026**. Contact Carla Taylor directly to secure preferred pricing and availability. All terms subject to final contract negotiation and execution.

All pricing excludes GST. Standard hourly rate is \$135 +GST. Retainer discounts range from 5% to 20% depending on tier and commitment term. Contact Carla Taylor at Carlorbiz to discuss your specific requirements and confirm availability.

CARLORBIZ 
Growth — Strategy

 Carla Taylor t/as Carlorbiz | carla@carlorbiz.com.au | www.carlorbiz.com.au