PROPOSAL / 8 FEBRUARY 2027 / CAL-MH-SOW-027

A practical route for every return.

Prepared by Nina Solis, Caldris Advisory, for Owen Mercer, Maren House.

8 weeks

1 Mar–23 Apr 2027

£18,000

Fixed fee, excluding tax

The engagement

One UK distribution centre; furniture returns for sofas, chairs and dining products. Diagnose intake and disposition, design a bounded pilot and hand over a usable operating routine.

The decision this supports

Whether Maren should adopt a mandatory intake record and named disposition owner before investing in new returns software. The engagement tests a bounded routine, not a warehouse-system replacement.

Working method

Two discovery workshops, three stakeholder conversations, a redacted 120-case review, a 20-case operating pilot and a final handover. Nina provides one consolidated revision of each deliverable.

Outside the scope

No warehouse-system build or integration; No refund-policy or consumer-rights advice; No supplier-contract renegotiation; No second distribution centre; No ongoing operations or debt collection; No guaranteed revenue, savings or cycle-time improvement.

SCOPE / DELIVERABLES

Three outputs. Clear review points.

Output	Due	Review basis
D1 / Current-state map and evidence register	2027-03-12	All agreed handoff steps represented, source IDs traceable and material factual corrections resolved.
D2 / Diagnostic and controlled-pilot design	2027-04-02	Findings tied to the sample; eligibility, owner, stop rules and pilot measures explicitly stated.
D3 / Recovery decision report and operating handover	2027-04-20	Pilot results reconciled, routing guide supplied, residual actions assigned and one handover delivered by 23 April.

Client inputs and accountability

Leah supplies the redacted extract and photo-completeness index. Tom owns operational execution and safety procedures. Owen supplies access, makes scope decisions and gives consolidated written review. Caldris can recommend a disposition routine but cannot approve product safety or refunds.

Acceptance

Owen provides one consolidated written response within five business days of a submitted deliverable. Silence and file access are not acceptance. Dates shown are agreed illustration targets; changes are recorded explicitly.

Changes

Record the requested difference, fee, date and acceptance impact before approval. New sites, systems or operating responsibility are outside this scope until explicitly agreed.

COMMERCIAL BASIS

Fees follow the agreed work.

Milestone	Condition	Net fee
M1 / 40%	Kickoff and evidence plan agreed	£7,200
M2 / 40%	D2 accepted in writing	£7,200
M3 / 20%	Final acceptance and handover	£3,600

Payment terms

Each invoice is due 14 calendar days after issue. The worked invoice uses an illustrative 20% VAT assumption. No expenses, late fees, bank details or automatic debit are included. M2 was planned for 6 April but becomes invoiceable on the actual 8 April acceptance; its actual invoice is outside the selected M1 ledger.

Illustrative agreement record

On 17 February Owen confirms the one-site scope, £18,000 net fee and 1 March start in the authored chronology. This is a source fixture, not a signature event or executed contract.

Decision ownership

Owen accepts scope and deliverables. Ruth verifies invoices. Leah supplies evidence. Tom owns the pilot. The consultant’s recommendation does not replace these decisions.