

# MAXWELL DEFINITIVE TECHNOLOGIES

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## Client Onboarding & Contract Template

Your complete guide to project initiation, scope management,  
deliverable tracking, and contractual agreement.

PREPARED FOR

**[Client Name]**

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Confidential — For Authorized Recipients Only

## DOCUMENT GUIDE

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## PART 1

# Client Onboarding Checklist

This checklist guides the Maxwell Definitive Technologies team through every stage of client onboarding — from first contact to project launch. Complete each step in sequence to ensure a smooth, professional client experience.

## 1 Initial Contact

- ✓ Confirm client interest and package selection
- ✓ Send introductory email with services overview, estimated timeline, and preliminary pricing

## 2 Pre-Project Questionnaire

Collect the following information from the client:

- **Company & Brand:** Company name, industry, and mission statement
- **Existing Assets:** Current branding assets (logos, fonts, brand guidelines)
- **Design Preferences:** Preferred colour palette, style direction, and inspirations
- **Deliverables:** Required outputs — logo, website pages, flyers, social media content
- **Content:** Available text, images, and video assets
- **Target Audience:** Demographics, psychographics, and market segment
- **Competitive Landscape:** Key competitors and market positioning notes

## 3 Project Proposal

Prepare and present a tailored proposal covering:

- Package details and selected tier
- Full list of deliverables and scope boundaries
- Timeline — start date, key milestones, and final delivery date
- Pricing breakdown by deliverable or phase
- Payment terms: deposit, milestone payments, and final payment schedule

## 4 Contract & Agreement

- ✓ Prepare contract using the scope template in Part 2 of this document
- ✓ Share contract with client for review — allow reasonable review period
- ✓ Collect signed contract (digital or physical) **before commencing any work**

*Note: No project work should begin until a fully executed contract is on file.*

## 5 Kickoff Meeting

- ✓ Review the full project plan with the client
- ✓ Confirm all deliverables, deadlines, and revision limits

- ✓ Establish the primary communication channel (email / Slack / WhatsApp / other)
- ✓ Introduce team members and define roles if applicable
- ✓ Document and share meeting notes within 24 hours

## 6 Asset Collection

Request and confirm receipt of all required client assets:

- Logo files (original vector formats preferred — AI, EPS, SVG)
- Brand photography and image library
- Video assets and raw footage
- Approved website / marketing copy and text content
- Login credentials for relevant platforms (CMS, hosting, social accounts)
- ✓ Verify quality, resolution, and completeness of all submitted assets
- ✓ Notify client promptly of any missing or substandard assets

## 7 Timeline & Milestones Confirmation

- ✓ Define and confirm intermediate deliverables: mockups, drafts, wireframes
- ✓ Schedule client review points for each milestone
- ✓ Formally align on revision limits (see Contract Scope, Section 3)
- ✓ Share finalised project timeline document with client

Milestone	Deliverable	Review Window	Revision Limit
Milestone 1	Concept / Initial Designs	48 hours	As per contract
Milestone 2	Draft Approval	48 hours	As per contract
Milestone 3	Final Delivery	48 hours	—

## 8 Start Work

- ✓ Begin work on the first milestone as per the agreed timeline
- ✓ Log and track all progress in the designated project management tool
- ✓ Provide the client with regular status updates at agreed intervals
- ✓ Escalate scope creep or blockers immediately via formal change request

*Completion of all eight steps marks a fully onboarded client. Retain this checklist in the project folder for reference throughout the engagement.*

## PART 2

## Contract Scope Template

This contract template governs all projects undertaken by Maxwell Definitive Technologies. Complete all bracketed fields before presenting to the client for signature. No work should commence until both parties have executed this agreement.

### 1 Parties

- **Service Provider:** Maxwell Definitive Technologies
- **Client:** [Client Name] · [Client Address] · [Client Contact]

### 2 Project Overview

- **Package Selected:** [Launch Lite / Professional / Growth / Custom]
- **Deliverables:** Logo(s), website pages, marketing assets (flyers, social media graphics, video content)
- **Start Date:** [MM/DD/YYYY] · **Estimated Completion:** [MM/DD/YYYY]

### 3 Scope of Work

- Work is strictly limited to the deliverables defined above and in the Project Proposal
- Any changes or additions outside the agreed scope require a written Change Request and may incur additional fees
- **Revision Limits:** Logos — 2 rounds · Flyers — 1 round per item · Website — 2 rounds

### 4 Payment Terms

The following payment schedule applies to all projects:

Payment Stage	Amount	Trigger
Deposit	50% of total fee	Upon contract signing — before work begins
Milestone Payment	25% of total fee	Upon client approval of draft deliverables
Final Payment	25% of total fee	Upon final delivery of all assets

- Late payments may result in project delays or suspension of work

### 5 Client Responsibilities

- Provide all required assets (content, images, credentials) in a timely manner
- Respond to review requests and feedback within **48 hours** of receipt
- Approve milestones or provide consolidated, actionable feedback promptly
- Delays caused by the client may result in a revised project timeline

### 6 Delivery & File Ownership

- **File Formats Delivered:** PNG, SVG, JPG, PDF, MP4, and other agreed formats
- Full ownership of deliverables transfers to the Client upon receipt of final payment
- Maxwell Definitive Technologies retains the right to showcase work in its portfolio (subject to client permission)
- Source files are included only if explicitly stated in the project proposal

### 7 Confidentiality

- Both parties agree to treat all shared information as strictly confidential
- Neither party shall disclose proprietary information to third parties without prior written consent
- Client data, login credentials, and business information will be handled securely and deleted upon project completion unless otherwise agreed

## 8 Termination

- Either party may terminate this agreement with written notice
- Maxwell Definitive Technologies retains all fees for work already completed at the time of termination
- Refunds apply only to unused deposit amounts as mutually agreed in writing
- Termination does not relieve the Client of payment obligations for completed milestones

## 9 Limitation of Liability

- Maxwell Definitive Technologies shall not be liable for lost revenue, loss of data, or business interruption
- The Service Provider is not responsible for failures in third-party software, platforms, or hosting services
- Liability for misuse of delivered assets by the Client or third parties rests solely with the Client
- Total liability shall not exceed the total fees paid under this agreement

## 10 Agreement Acceptance

- This agreement may be executed digitally (e-signature) or by physical signature
- Both parties confirm they have read, understood, and agree to all terms set out in this document
- This agreement constitutes the entire understanding between both parties and supersedes all prior discussions

## SIGNATURES

SERVICE PROVIDER Maxwell Definitive Technologies	CLIENT [Client Name]
Signature: _____	Signature: _____
Printed Name: _____	Printed Name: _____
Title: _____	Title: _____
Date: _____	Date: _____

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