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Simple Agreement Checklist

These are examples, not promises. The people and businesses are illustrative. This is general business education, not legal, tax or financial advice. Contract rules differ by country. Check your local rules with a local lawyer. loftybiz.net

How to use this sheet (this week)

Write a one-page agreement template for your biggest kind of job, and a short set of standard terms for everything else. List every supplier and contractor without a written deal. Then book one review with a local lawyer before you start using them. Keep the templates, proofs and deals in Systex at loftybiz.net, so you can find them when you need them.

1. One-page agreement for bigger projects — five headings

Both sides sign, on paper or electronically, before any work begins. A reusable template often takes about twenty minutes to fill once you have one.

#	Heading	Write this in plain words	Your notes
1	Scope	What you will deliver, and what is not included.	
2	Price and payments	The total, the deposit, the payment dates, and that work pauses if a payment is late.	
3	Timeline and client inputs	Your dates, what the client must send, and that late content moves the launch date by the same number of	
4	Changes	Two rounds of revisions (or your number). Anything new is a written change request, with its own price an	
5	Ownership and ending	Who owns the finished work, and when (for example, when the final payment clears). How either side can	

Illustrative example only (not a promise): a web design studio wrote “Five-page website, contact form, basic search setup. Not included: online shop, blog, booking system,” and took 40% before work, 40% at design sign-off and 20% at launch.

2. Standard terms for every order — five steps

#	Step	Put this in place	Done?
1	Write standard terms once	One page, plain language, attached to every quote. Deposit, proof approval, delivery times, and what h	
2	Proof approved in writing	A signature, or a clear “approved” by message, against the exact file that will be produced. Keep it with	
3	Make guarantees clear and fai	Specific and believable. Example shape: if you produce something different from the approved proof, y	
4	Suppliers and contractors in writing	Delivery times and payment dates with suppliers. For contractors: who owns the work once it is paid fo	
5	One lawyer review	Agree the fee and the scope up front with a local lawyer who works with small businesses. Reuse the te	

3. This week’s kit

	Item	Notes / date
	One-page agreement template for my biggest kind of job	
	Short standard terms for everything else	
	Proof-approval habit in place (signature or written “approved”)	
	List of every supplier and contractor without a written deal	
	Lawyer review booked, fee and scope agreed up front	
	Templates, proofs and deals stored so I can find them (for example in Systex)	

Three mistakes to avoid: copying a long contract from the internet that you do not understand; starting work before the deposit and the signature; doing free trial work with no end date (offer a small, paid first stage with a clear finish instead). Show terms before payment, every time. If a term would make you angry as a customer, rewrite it.

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