SOPs for Retainer Clients

New Agreement:

1. AM to create a project folder in TeamWork.
2. Invoicing
   - Invoices should be sent on the first of the month.
   - This needs to be outlined in the contract and will help streamline sending invoices.
   - For contracts starting after the first of the month, the first invoice will be pro-rated to normalize the billing schedule to the first of the month.
3. AM to send all new countersigned contracts to Ten, and she will file it in the TeamWork project folder, and add the client to the excel hours tracker.

When sending the countersigned agreement to Ten, include in the email the following information below:

- Start and End date (example: 2-1-2023)
- Term of agreement (x months, x years)
- Final invoice date/auto-renew
- Monthly hours or total contract hours
- Monthly amount to be invoiced 1st of the month

Pause/End Agreement:

4. As a general rule, if we pause a contract, Ted would like to be involved in the conversation. When a contract is paused, they have 30 days to pause it. If they would like to put the project on hold for 6 mos, they need to sign a new agreement and bill for 30 days.

Mid-Month Hours Tracker:

5. AMs and Ten to confirm all hours are tracked at mid-month by end of day on the 15th.
6. Ten to pull the final hours for the mid-month report. Report will be uploaded to One Drive and will be shared in an email to the AMs in 1-2 business days.
7. AM to send mid-month email template to client.

End of Month Hours Tracker:

8. At the end of month, AM to confirm all hours are tracked by noon.
9. Ten to send report screenshot in Teams Channel (Retainer Clients General) by 2pm and tag the AM. End of month report will be available in One Drive.
10. AM to send overage invoices to the client by close of business.