



ClickBit: Client Onboarding & Project Agreement

Introduction

This document serves as a comprehensive checklist and agreement for onboarding new clients and managing their service requirements. It is designed to ensure that all necessary information is collected, and all required services are properly identified and documented to lay the foundation for a successful partnership.

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1. Client Information

This foundational section is dedicated to meticulously capturing all critical details concerning the client. The accuracy and completeness of this information are paramount for effective communication and project management.

1.1. Client Identification

- **Client Name:**

 - (The full legal name of the individual or entity engaging our services.)
- **Primary Contact Person:**

 - (The main point of contact for all project-related communications.)
- **Email:** _____
- **Phone:** _____

1.2. Organisational Context

- **Company/Organisation:** _____
- **Company Address (Optional but Recommended):**

- **Industry/Sector (Optional but Recommended):**

-

1.3. Project Timelines

- **Project Start Date:** _____
- **Expected Completion Date:** _____
- **Key Milestones (Optional but Recommended):**

- _____

1.4. Additional Information (Optional but Recommended)

- **Client Background/History:**

- **Key Stakeholders (Beyond Contact Person):**

- **Initial Project Goals/Objectives:**

- _____

2. Project Overview

This section provides a comprehensive overview of the project, outlining its fundamental aspects and strategic significance.

- **Project Name:** _____
- **Project Description:**

- **Business Objectives:**

- **Target Audience:**

- **Key Stakeholders:**

3. Service Requirements

This section identifies the specific services requested by the client.

3.1. Primary Service Selection

Select the main service category that best describes the client's needs:

- **360 Brand Building Service:** A holistic digital solution to establish and amplify your brand's presence across all relevant platforms.
- **Web Service:** The entire lifecycle of website development, from concept and design to coding, deployment, and ongoing maintenance.
- **Mobile Service:** Crafting native and hybrid mobile applications (iOS and Android) with intuitive user experiences and powerful functionality.
- **Desktop Service:** Development of custom desktop software applications tailored to specific business needs.
- **Server Service:** Comprehensive server setup, configuration, and ongoing management (bare-metal, VPS, dedicated).
- **Cloud Service:** Scalable and cost-effective cloud infrastructure and solutions (IaaS, PaaS, SaaS).
- **AI Service:** Solutions leveraging Artificial Intelligence and Machine Learning for data analysis, automation, and intelligent systems.
- **Data Service:** Comprehensive data management and analytics solutions, from collection and warehousing to business intelligence.

- [] **Security Service:** Robust cybersecurity solutions to protect digital assets, including vulnerability assessments and penetration testing.
- [] **Network Service:** Design, implementation, and management of robust and secure network infrastructures (LAN, WAN, wireless).
- [] **Storage Service:** Diverse data storage solutions, from on-premise to cloud-based, for backup, archival, and disaster recovery.
- [] **CRM Service:** Implementation and customization of Customer Relationship Management systems.
- [] **ERP Service:** Expertise in Enterprise Resource Planning systems to integrate and manage core business processes.
- [] **HRM Service:** Human Resource Management systems that streamline HR operations.
- [] **SCM Service:** Supply Chain Management systems to optimise the flow of goods, services, and information.
- [] **Email Service:** Reliable and secure email hosting and management solutions for businesses.
- [] **Digital Marketing:** A broad array of strategies including SEO, SEM, content management, and social media marketing.

3.2. Custom Requirements

This section details the specific needs and expectations for the chosen service.

3.2.1. Design Requirements

- **Style Preferences:** (e.g., Minimalist, Corporate, Vibrant, Modern, etc.) _____
- **Color Scheme:** (Primary, secondary, accent colours, hex codes) _____

- **Brand Guidelines:** (Are there existing guidelines to follow? Yes/No) _____
- **Design Inspiration:** (URLs of websites, apps, or other designs) _____
- **Layout Preferences:** (Grid systems, hierarchy, navigation schemes) _____
- **Responsive Design Needs:** (Mobile, tablet, desktop considerations) _____
- **Accessibility Requirements:** (e.g., WCAG compliance level A, AA, AAA) _____
- **Special Design Elements:** (Animations, interactive elements, custom iconography, etc.) _____

3.2.2. Functional Requirements

- **Core Features:** (e.g., User registration, product catalog, payment gateway) _____
- **User Interactions:** (Navigation flows, forms, user actions) _____
- **Workflow Requirements:** (Business processes to be supported or automated) _____
- **Integration Needs:** (Third-party APIs, CRM, ERP, etc.) _____
- **User Roles and Permissions:** (Admin, standard user, guest, etc.) _____
- **Authentication Requirements:** (Email/password, social login, MFA, SSO) _____
- **Data Handling Needs:** (Data collection, storage, privacy, retention) _____
- **Reporting Requirements:** (Analytics, dashboards, types of reports) _____
- **Search & Filtering Functionality:** (Searchable content, filters, sorting) _____

3.2.3. Technical Requirements

- **Platform Preferences:** (Web, iOS, Android; specific frameworks or CMS) _____
- **Technology Stack:** (Languages, databases, servers) _____
- **Performance Needs:** (Page load times, API response times, concurrent users) _____
- **Security Requirements:** (Data encryption, compliance needs like GDPR/PCI DSS) _____
- **Database Requirements:** (Database type, estimated data volume) _____
- **API Specifications:** (Internal or external APIs to be used/developed) _____
- **Hosting Requirements:** (Cloud provider, server locations, scalability needs) _____
- **Backup & Monitoring Needs:** (Backup frequency, disaster recovery, monitoring tools) _____

3.2.4. Content Requirements

- **Content Types:** (Text, images, videos, audio, documents) _____
- **Content Sources:** (Client-provided, stock media, to be created by us) _____
- **Update Frequency & Management:** (How often will content be updated? Who is responsible?) _____
- **SEO Requirements:** (Keywords, meta descriptions, URL structure) _____
- **Localization Needs:** (Multiple languages or regional adaptations required?) _____
- **Content Approval Process:** (Internal review, stakeholder review, final sign-off) _____
- _____

3.2.5. Additional Project Requirements

This section details any specific needs or functionalities beyond the core scope that are crucial for the project's success.

3.2.6. Project Constraints

This section defines the limitations or restrictions that influence the project's scope, schedule, and resources (e.g., fixed budget, hard deadlines).

3.2.7. Future Expansion Plans

This section outlines potential enhancements or new features envisioned for the project beyond its initial scope to ensure the current design is scalable and flexible.

4. Digital Marketing Services

Select the services that align with your strategic goals.

4.1. Search Engine Optimization (SEO)

- **On-Page Optimization:** Optimising content, title tags, meta descriptions, and images.
- **Off-Page Optimization:** Building high-quality backlinks from authoritative websites.
- **Technical SEO:** Improving site speed, mobile-friendliness, site architecture, and structured data.
- **Local SEO:** Optimising Google My Business and local citations for relevant local searches.

4.2. Social Media

- **Social Media Optimization (SMO):** Enhancing profile discoverability, content engagement, and audience interaction.
- **Social Media Marketing (SMM):** Full strategy development, content creation, community management, and campaign execution.

4.3. Paid Advertising

- **Search Engine Marketing (SEM):** Managing paid campaigns on Google Ads and Bing Ads.
- **Pay Per Click (PPC) Management:** Full campaign setup, keyword research, ad copy creation, and budget management.
- **Multi-Platform Ad Campaigns:** Strategic ad management on Meta (Facebook/Instagram), TikTok, and other relevant platforms.
- **Display Advertising & Remarketing:** Visual ads across websites/apps and targeting previous website visitors.

4.4. Content & Email Marketing

- **Email Marketing:** Newsletter creation, campaign management, and performance tracking.
- **Content Marketing:** Creation of blog posts, articles, infographics, videos, or podcasts.

4.5. Platforms to Manage

- TikTok
- YouTube
- Instagram
- Facebook
- Twitter (X)
- LinkedIn
- Pinterest
- Other Forums: _____

5. Design Services

Select from the following options to indicate your required design services.

5.1. Logo & Brand Identity

- **Logo Design:** Concept development, colour scheme, typography, and final file formats (JPEG, PNG, SVG, etc.).
- **Brand Design:** Developing a complete brand identity, including visual elements and comprehensive brand guidelines/style guide.
- **Brand Strategy:** Defining market positioning, target audience, brand values, and messaging.

5.2. Marketing Materials

- [] Banner Design (Digital and/or Print)
- [] Flyer Design
- [] Brochure Design (Bi-fold / Tri-fold)
- [] Business Card Design
- [] Letterhead & Envelope Design

6. Project Timeline

This section outlines the anticipated timeline for the project. Dates are estimates and subject to change based on project complexities and feedback cycles.

- **Phase 1: Planning & Requirements**
 - **Start Date:** [Insert Date] **End Date:** [Insert Date]
 - **Deliverables:** Detailed Project Scope, Requirements Specifications (User & Technical), Draft Project Plan.
- **Phase 2: Design & Development**
 - **Start Date:** [Insert Date] **End Date:** [Insert Date]
 - **Deliverables:** System Architecture, UI/UX Mockups, Developed Modules (Alpha Version).
- **Phase 3: Testing & Quality Assurance**
 - **Start Date:** [Insert Date] **End Date:** [Insert Date]
 - **Deliverables:** Integrated System (Beta Version), Test Case Results, Bug Report Log, UAT Sign-off.
- **Phase 4: Launch & Deployment**
 - **Start Date:** [Insert Date] **End Date:** [Insert Date]
 - **Deliverables:** Deployment Plan, User Manuals, System Go-Live, Project Closure Report.

7. Budget & Payment

- **Total Project Budget:**

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- (This figure encompasses all agreed-upon services, deliverables, and estimated hours.)

7.1. Payment Schedule

- **Initial Deposit:** _____ (Due upon signing to commence work)
- **Milestone 1 Payment:** _____ (Due upon completion of Phase 1)
- **Milestone 2 Payment:** _____ (Due upon completion of Phase 2)
- **Final Payment:** _____ (Due upon project completion, before final handover)

7.2. Potential Additional Costs

- **Hosting:** _____ (e.g., monthly/annually)
- **Domain:** _____ (e.g., annually)
- **Third-party Services/Licenses:** _____
- **Ongoing Maintenance:** _____ (If not included in a separate agreement)

8. Existing System Updates

This section is for clients requiring updates to operational systems.

- **Website Update:**
 - Current Platform: _____ **Update**
 - Requirements: _____
- **Application Update:**
 - Current Version: _____ **Update Scope:**

- **Database Update:**
 - Current Database: _____ **Update Type:**

- **Infrastructure Update:**
 - Current Setup: _____ **Update**
 - Requirements: _____
- **Security Update:**
 - Current Measures: _____ **Update**
 - Requirements: _____
- **Integration Update:**
 - Current Integrations: _____ **New Integration Needs:**

9. Project Team

- **Project Manager:** The primary point of contact responsible for overall planning, execution, and communication.
- **Technical Lead:** Responsible for the technical vision, architecture, and integrity of the project.
- **Design Lead:** Responsible for the user experience (UX) and user interface (UI) design.
- **Development Team:** Responsible for writing, testing, and maintaining the software.
- **QA Team:** Responsible for comprehensive testing to ensure the quality and reliability of the final product.

10. Agreement and Terms

By signing this document, you ("the Client") acknowledge and agree to the following legally binding terms with ClickBit ("the Service Provider"). This agreement supersedes any prior agreements, whether written or oral.

- 1. Project Authorisation:** The Client authorises the Service Provider to proceed with the project as detailed in this document. The Client confirms they have the authority to grant this authorisation.
- 2. Project Scope and Changes:** The project scope is defined in this document. Any additional features or significant changes ("Scope Changes") will require a formal written Change Request, which may impact project costs and timelines. All changes must be mutually agreed upon and signed by both parties.
- 3. Intellectual Property Rights:** The Client warrants they own or have the rights to use all materials provided for the project. Upon full and final payment, ownership of the final custom deliverables (e.g., source code, design files developed specifically for the Client) will be transferred to the Client. The Service Provider retains ownership of all its pre-existing intellectual property, proprietary tools, and methodologies.

4. **Confidentiality:** Both parties agree to maintain the confidentiality of all non-public information shared during the project. This obligation survives the termination of this agreement. The Service Provider may use anonymised project details for portfolio purposes with prior Client consent, which shall not be unreasonably withheld.
5. **Payment Terms:** The Client agrees to adhere to the payment schedule outlined in Section 7. The Service Provider may suspend work if payments are delayed. Final deliverables and intellectual property transfer will occur only after full and final payment is received. Late payments may incur interest at a rate of 10% per annum, calculated daily.
6. **Warranty:** The Service Provider warrants that its services will be performed in a professional manner consistent with industry standards. This warranty does not cover issues arising from Client modifications or third-party software not provided by the Service Provider. Ongoing support and maintenance are not included unless specified in a separate agreement.

7. **Limitation of Liability:** The Service Provider's total liability under this agreement shall be limited to the total fees paid by the Client for the services giving rise to the claim. The Service Provider is not liable for any indirect, incidental, or consequential damages, including loss of profits, data, or business. This includes damages arising from third-party service failures, client-provided materials, or delays caused by the Client.
8. **Indemnification:** The Client agrees to indemnify and hold harmless the Service Provider from any claims, damages, or costs arising from the Client's breach of this agreement, violation of any laws, or use of the project deliverables.
9. **Data Protection and Privacy (Australia):** Both parties acknowledge their obligations under the Privacy Act 1988 (Cth) and the Australian Privacy Principles (APPs). The Client warrants they have obtained all necessary consents for any personal information provided. The Service Provider will handle all personal information in accordance with its Privacy Policy and the APPs, implementing reasonable security measures to protect data. Both parties agree to notify the other of any data breaches as required by the Notifiable Data Breaches (NDB) scheme.

- 10. Termination:** Either party may terminate this agreement with thirty (30) days' written notice if the other party commits a material breach and fails to remedy it within fourteen (14) days. Upon termination, the Client must pay for all work completed and expenses incurred up to the termination date.
- 11. Force Majeure:** Neither party shall be liable for delays or failures in performance (excluding payment obligations) due to circumstances beyond their reasonable control, such as acts of God, natural disasters, pandemics, government actions, or major technical failures.
- 12. Governing Law and Jurisdiction:** This agreement is governed by the laws of New South Wales, Australia. Any disputes will be subject to the exclusive jurisdiction of the courts of New South Wales. The parties agree to attempt good faith negotiation and mediation before pursuing legal action.
- 13. Severability:** If any provision of this Agreement is found to be invalid or unenforceable, the remaining provisions shall remain in full force and effect. The parties agree to negotiate a valid, enforceable substitute provision that most closely achieves the original intent.

- 14. Assignment:** Neither party may assign its rights or obligations under this agreement without the prior written consent of the other party.
- 15. Entire Agreement:** This document constitutes the entire agreement between the parties and supersedes all prior understandings. Any modifications must be in writing and signed by both parties.

11. Signatures

By signing below, the parties acknowledge that they have read, understood, and agree to be bound by the terms and conditions of this entire document.

For the Client:

Signature: _____

Name: _____

Title: _____

Date: _____

For ClickBit (Service Provider):

Signature: _____

Name: _____

Title: _____

Date: _____

Note: This document should be reviewed and updated regularly throughout the project lifecycle.