



MAINTENANCE & RETAINER GUIDE

Workflow Automation Delivery Framework

ENTERPRISE EDITION

Version: 2.0

Date: December 28, 2025

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Retainer Models

Model Comparison

MODEL	BEST FOR	PRICING	PROS	CONS
Hours-Based	Unpredictable needs	\$X/hour, X hours/month	Flexible, pay for what you use	Tracking overhead
Fixed Monthly	Predictable needs	\$X/month flat	Predictable, simple	May over/under serve
Hybrid	Growing clients	Base + hourly overage	Balance of predictable + flexible	More complex

Hours-Based Retainer

STRUCTURE:

Monthly Hours: X hours

Rate: \$X/hour

Rollover: Yes/No (max X hours)

Overage Rate: \$X/hour

INCLUDES:

- Bug fixes
- Minor adjustments
- Monitoring
- Monthly check-in
- Priority response

TIME TRACKING:

- Track in 15-min increments
- Log all work
- Monthly report to client
- Unused hours: rollover or forfeit

EXAMPLE:

5 hours/month at \$150/hour = \$750/month

Rollover max: 5 hours

Overage: \$175/hour

Fixed Monthly Retainer

STRUCTURE:

Monthly Fee: \$X

Scope: Defined activities

INCLUDES:

- Up to X hours of work
- Bug fixes
- Minor tweaks
- Monitoring
- Updates
- Monthly check-in
- Priority support

EXCLUDES (billed separately):

- New features
- New workflows
- Major changes
- New integrations

EXAMPLE:

\$1,000/month covers:

- Up to 5 hours of maintenance
- All bug fixes
- Monitoring
- Updates
- Monthly 30-min call

Hybrid Retainer

STRUCTURE:

Base Fee: \$X/month (includes Y hours)

Overage: \$X/hour

INCLUDES IN BASE:

- First Y hours of work
- Monitoring
- Bug fixes
- Monthly check-in

OVERAGE TRIGGERS:

- Beyond Y hours
- Billed at end of month
- Client notified before exceeding

EXAMPLE:

Base: \$500/month (includes 3 hours)

Overage: \$150/hour

Typical month: \$500

Busy month: $\$500 + (2 \text{ extra hours} \times \$150) = \$800$

Service Level Agreement (SLA)

Response Times

SEVERITY LEVELS:

CRITICAL (System Down)

Definition: Workflow completely broken, major business impact

Response: Within 2-4 hours (business hours)

Resolution Target: Same business day

HIGH (Significant Issue)

Definition: Partial failure, degraded performance

Response: Within 4-8 hours

Resolution Target: 24 hours

MEDIUM (Minor Issue)

Definition: Feature not working, workaround exists

Response: Within 24 hours

Resolution Target: 3-5 business days

LOW (Enhancement/Question)

Definition: Nice-to-have, cosmetic, questions

Response: Within 48 hours

Resolution Target: Next maintenance cycle

SLA Document Template

Service Level Agreement

Parties

Provider: [Your Company]

Client: [Client Company]

Effective Date: [Date]

Covered Services

- Workflow monitoring
- Bug fixes
- Minor updates
- Security patches
- Monthly check-ins

Response Commitments

Severity	Response Time	Resolution Target
Critical	2-4 hours	Same day
High	4-8 hours	24 hours
Medium	24 hours	3-5 days
Low	48 hours	14 days

Availability

- Business hours: [M-F, 9am-6pm TZ]
- Emergency contact: [method]
- Holiday schedule: [details]

Exclusions

- New feature development
- New workflow creation
- Third-party service outages
- Client-caused issues

Escalation

Level 1: [Contact method]

Level 2: [Phone/urgent email]

Level 3: [Emergency protocol]

Reporting

- Monthly summary report
- Incident reports for Critical/High
- Quarterly review call

Terms

- 30-day termination notice
- Monthly billing, due Net 15
- Annual review of terms

Maintenance Activities

Monthly Maintenance Checklist

WEEK 1: Monitoring Review

- Review all executions from past week
- Check error rates
- Verify all workflows active
- Review any alerts

WEEK 2: Performance & Cost

- Check API usage/costs
- Review execution times
- Identify optimization opportunities
- Check for rate limit issues

WEEK 3: Updates & Security

- Check for n8n updates
- Review integration updates
- Apply security patches
- Test after any updates

WEEK 4: Client Touchpoint

- Prepare monthly report
- Monthly check-in call
- Address any concerns
- Plan next month

Monthly Report Template

```

# Monthly Maintenance Report

## Client: [Name]
## Period: [Month Year]

---

## Executive Summary
[2-3 sentence overview]

## Workflow Performance

### Execution Statistics
| Metric | This Month | Last Month | Change |
|-----|-----|-----|-----|
| Total Executions | X | X | +/-X% |
| Successful | X (X%) | X | |
| Failed | X (X%) | X | |
| Avg Execution Time | Xs | Xs | |

### API Usage & Costs
| Service | Usage | Cost |
|-----|-----|-----|
| OpenAI | X tokens | $X |
| [Other] | X calls | $X |
| **Total** | | **$X** |

## Issues & Resolutions

| Date | Issue | Severity | Resolution | Time Spent |
|-----|-----|-----|-----|-----|
| | | | | |

## Work Completed
- [Item 1]
- [Item 2]
- [Item 3]

## Recommendations
1. [Recommendation]
2. [Recommendation]

## Next Month Plan
- [Planned activity]
- [Planned activity]

## Retainer Summary
Hours included: X
Hours used: X
Hours remaining: X

```

Proactive Monitoring

AUTOMATED MONITORING:

1. ERROR RATE ALERTS

Trigger: Error rate > 10%

Action: Email/Slack notification

2. EXECUTION FAILURES

Trigger: 3+ consecutive failures

Action: Immediate notification

3. API USAGE

Trigger: Approaching quota/budget

Action: Warning notification

4. WORKFLOW INACTIVE

Trigger: No executions in X days

Action: Check if intentional

MONITORING WORKFLOW:

- Runs daily
- Checks all client workflows
- Logs to monitoring sheet
- Alerts on thresholds

Billing & Legal

Contract Essentials

Retainer Agreement Must Include:

1. PARTIES
 - Your company details
 - Client company details
2. SERVICES
 - Specific services included
 - What's explicitly excluded
 - Service level commitments
3. TERM
 - Start date
 - Duration (monthly, annual)
 - Auto-renewal terms
4. FEES
 - Monthly/annual fee
 - Payment due date
 - Late payment terms
 - Overage rates
5. TERMINATION
 - Notice period (30 days typical)
 - Exit procedures
 - Final billing
6. INTELLECTUAL PROPERTY
 - Client owns deliverables
 - You retain generic patterns
 - License to pre-existing tools
7. CONFIDENTIALITY
 - Both parties bound
 - Data handling
 - Survival after termination
8. LIABILITY
 - Limitation of liability
 - Indemnification
 - Insurance requirements (if any)
9. GENERAL
 - Governing law
 - Dispute resolution
 - Amendment process

Invoice Template

INVOICE	
Invoice #: [INV-XXXX]	
Date: [Date]	
Due: [Due Date]	
FROM:	
[Your Company Name]	
[Address]	
[Email]	
TO:	
[Client Company]	
[Contact Name]	
[Address]	
<hr/>	
DESCRIPTION	AMOUNT
Monthly Retainer - [Month Year] Includes: Monitoring, bug fixes, updates	\$X,XXX
Overage Hours: X hours @ \$XXX/hr [Brief description of work]	\$XXX
<hr/>	
	SUBTOTAL \$X,XXX
	TAX (X%) \$XXX
	<hr/>
	TOTAL DUE \$X,XXX
<hr/>	
PAYMENT METHODS:	
- Bank Transfer: [Details]	
- Card: [Link]	
- Other: [Details]	
NOTES:	
Thank you for your continued partnership!	
<hr/>	

Scope Protection

What's Included vs Excluded:

INCLUDED IN RETAINER:

Maintenance:

- Bug fixes
- Error resolution
- Performance tweaks
- Security updates

Monitoring:

- Execution oversight
- Error alerting
- Log review

Support:

- Questions answered
- Troubleshooting
- Minor adjustments

Communication:

- Monthly check-in call
- Monthly report
- Email support

NOT INCLUDED (Bill Separately):

New Development:

- New workflows
- New features
- New integrations
- Major redesigns

Consulting:

- Strategy sessions
- Architecture planning
- Process design

Training:

- New team members
- Deep dives
- Workshops

Emergency:

- Outside business hours
- Weekend work
- Holiday work

Handling Out-of-Scope Requests:

WHEN CLIENT ASKS FOR MORE:

1. ACKNOWLEDGE

"That's a great idea!"

2. CLARIFY

"Let me make sure I understand what you need..."

3. EXPLAIN

"That would be outside our current retainer scope, which covers [included items]."

4. OFFER OPTIONS

"I can:

- a) Quote this as a separate project
- b) Add it to our next project phase
- c) Include it if we upgrade your retainer"

5. DOCUMENT

Log the request for future reference

Communication Cadence

Regular Touchpoints

WEEKLY:

- Monitoring review (internal)
- Status update if issues

MONTHLY:

- Check-in call (30 min)
- Written report
- Invoice

QUARTERLY:

- Strategy review (60 min)
- Retainer assessment
- Roadmap planning

ANNUALLY:

- Contract renewal discussion
- Rate review
- Relationship check

Monthly Check-In Agenda

MONTHLY CALL (30 min)

1. PERFORMANCE REVIEW (10 min)

- Executions summary
- Any issues/resolutions
- Costs overview

2. UPCOMING WORK (5 min)

- Planned maintenance
- Known updates coming

3. CLIENT FEEDBACK (10 min)

- How's it going?
- Any concerns?
- New needs arising?

4. NEXT STEPS (5 min)

- Action items
- Next call date

Retainer Transitions

Starting a Retainer

POST-PROJECT RETAINER:

1. PROPOSE

"Now that the project is complete, I offer ongoing maintenance retainers. Here's what that looks like..."

2. PRESENT OPTIONS

- Option A: [Basic]
- Option B: [Standard]
- Option C: [Premium]

3. AGREE ON TERMS

- Scope
- SLA
- Pricing
- Start date

4. DOCUMENT

- Retainer agreement signed
- Expectations documented

5. TRANSITION

- Move from project mode to retainer mode
- Set up regular touchpoints

Upgrading/Downgrading

RETAINER ADJUSTMENT:

When client needs change:

1. Assess current usage
2. Discuss new needs
3. Propose adjusted scope
4. Update agreement
5. Adjust billing

UPGRADE TRIGGERS:

- Consistently exceeding hours
- New workflows added
- Higher support needs
- Business growth

DOWNGRADE TRIGGERS:

- Underusing hours
- Budget constraints
- Reduced complexity

Ending a Retainer

RETAINER TERMINATION:

1. NOTICE RECEIVED
 - Document the request
 - Confirm termination date
 - Review contract terms
2. TRANSITION PLAN
 - What needs to happen before end
 - Knowledge transfer if new provider
 - Final documentation updates
3. FINAL PERIOD
 - Complete outstanding work
 - Final maintenance tasks
 - Handover preparation
4. EXIT DELIVERABLES
 - Updated documentation
 - Final backups
 - Access removed
5. FINAL BILLING
 - Pro-rated amount (if applicable)
 - Any outstanding invoices
6. RELATIONSHIP CLOSE
 - Thank you
 - Feedback request
 - Door open for future

Quick Reference

Retainer Pricing Guidelines

TYPICAL RANGES (adjust for your market):

BASIC (Small, simple)

- 2-3 hours/month
- \$300-500/month

STANDARD (Medium complexity)

- 5-8 hours/month
- \$750-1,200/month

PREMIUM (Complex, critical)

- 10+ hours/month
- \$1,500-3,000/month

ENTERPRISE (Custom)

- Dedicated support
- Custom SLAs
- \$3,000+/month

Retainer Health Indicators

HEALTHY RETAINER:

Regular communication
Issues resolved quickly
Client satisfied
Scope respected
Payments on time
Growing relationship

UNHEALTHY RETAINER:

Scope creep accepted
Client never available
Late payments
Constant complaints
Underutilized
Relationship strained

Next: See [07-offboarding-guide.md](#) for exit processes.

Workflow Automation Delivery Framework | next8n | <https://next8n.com>

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