



# MAINTENANCE & RETAINER GUIDE

---

Workflow Automation Delivery Framework

ENTERPRISE EDITION

**Version:** 2.0

**Date:** December 28, 2025

**Author:** Mirza Iqbal

**Contact:** [mirza.iqbal@next8n.com](mailto:mirza.iqbal@next8n.com)

# Table of Contents

---

Table of Contents

Maintenance & Retainer Guide

Ongoing Support, Billing & Legal Framework

---

Retainer Models

Model Comparison

---

Hours-Based Retainer

---

Fixed Monthly Retainer

---

Hybrid Retainer

---

Service Level Agreement (SLA)

Response Times

---

SLA Document Template

---

Maintenance Activities

Monthly Maintenance Checklist

---

Monthly Report Template

---

Proactive Monitoring

---

Billing & Legal

---

Contract Essentials

---

Invoice Template

---

Scope Protection

---

Communication Cadence

---

Regular Touchpoints

---

Monthly Check-In Agenda

---

Retainer Transitions

---

Starting a Retainer

---

Upgrading/Downgrading

---

Ending a Retainer

---

Quick Reference

---

Retainer Pricing Guidelines

---

Retainer Health Indicators

---

# Maintenance & Retainer Guide

---

## Ongoing Support, Billing & Legal Framework

---



---

### 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]

DESCRIPTION	AMOUNT
Monthly Retainer - [Month Year] Includes: Monitoring, bug fixes, updates	\$X,XXX
Overage Hours: X hours @ \$XXX/hr [Brief description of work]	\$XXX
	SUBTOTAL \$X,XXX
	TAX (X%) \$XXX
	<hr/> TOTAL DUE \$X,XXX

PAYMENT METHODS:

- Bank Transfer: [Details]
- Card: [Link]
- Other: [Details]

NOTES:

Thank you for your continued partnership!

## 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>

This document is confidential and intended for authorized use only.