Customer Agreement Worksheet

Fill this in before you run Demo 1. Then take your draft and this page to a lawyer once, before your first customer signs.

Write "none" or "not applicable" where a line does not fit your business. This is a worksheet, not a finished contract. It helps you decide your terms so AI and your lawyer can turn them into an agreement that fits your business and your state.

1. Who are we?

My legal business name: _____

Customer name (filled in per job): _____

2. What exactly am I doing, and not doing?

What I deliver: _____

_____

What is NOT included: _____

3. How much, and when do you pay me?

Price or how I price: _____

Deposit, if any, and when it is due (or "none"): _____

Balance and when it is due: _____

What happens if a payment is late: _____

4. When?

Dates or timeline: _____

What happens if the dates move: _____

5. What if something goes wrong?

What I am responsible for: _____

What the customer is responsible for: _____

Questions for my lawyer about limits: _____

6. How do we end it?

If the customer cancels, what happens to any money paid: _____

_____

If I have to cancel: _____

If we disagree (talk first, then): _____

Changes after approval

How changes are priced and how they affect the date: _____

Say it out loud (practice)

“Here is how payment works: [WHEN AND HOW YOU GET PAID]. If plans change, here is what happens: [YOUR TERMS]. I will send you a short agreement today. Read it, sign it, send it back, and your date is locked.”

Then use the Demo 1 prompt in the Prompt Pack to turn these answers into a draft.

Checklist for my lawyer

- Is my payment and cancellation policy clear and appropriate for my state and my kind of work?
- How should I word what I am and am not responsible for?
- Do I need anything specific to my industry (food, childcare, health, animals, data)?
- How should disputes be handled?
- Is anything in my draft unclear or one-sided in a way that could cause trouble?

This handout is general education for the VEC class, not legal, tax, or insurance advice. Rules change and vary by state, county, and business. Check the official source and ask a licensed professional before you act.