

[YOUR AGENCY]

Client Agreement

[YOUR SERVICE NAME] - Meridian Freight Systems

FICTIONAL WORKED EXAMPLE. Meridian Freight Systems and Dana Whitfield are invented. Every commercial term is a [PLACEHOLDER] for you to fill from config.md. Delete this notice, and replace the scope narrative with your own client's words, before sending.

This agreement covers the ongoing engagement that follows the free pilot. The pilot itself - profile setup and a first campaign ahead of the National Freight Technology Expo (March 3 to 4, 2027) - runs at no cost and needs no signature. This document takes effect only if Meridian moves into the paid engagement described below.

THE PARTIES

Field	Details
Service Provider	[YOUR LEGAL ENTITY], trading as [YOUR TRADING NAME]
Client	Meridian Freight Systems (Dana Whitfield, Commercial Director)
Effective Date	Upon receipt of first payment, following the free pilot
Initial Term	[YOUR MONTHLY RETAINER] per month for [INITIAL TERM LENGTH] from onboarding call
Ongoing	[YOUR MONTHLY RETAINER] per month after initial term, no lock-in

THE SCOPE - WHAT YOU GET

Thanks for walking me through where things are at on the call. Here's what I took away.

Meridian has real depth. Twelve years moving freight for mid-market manufacturers, a live-tracking platform your customers actually log into, and a retention record your operations team earned the hard way. You have the case studies, and the two largest accounts came from referrals rather than anything you went out and built. The delivery is there. The problem is that not enough of the right companies are booking time with you.

What's getting in the way

- **Manual research is eating the sales week.** Your team is building lists by hand instead of running the discovery calls they should be spending their time on. That does not scale, and it is the wrong use of them.
- **Trade shows carry the pipeline, and they are expensive.** A stand at a national expo costs real money. Without a system working the room before, during, and after, most of that spend never turns into a booked meeting.

- **Three service lines, one message, no focus.** Freight brokerage, warehousing, and the tracking platform are three different buyers with three different problems. One blended list waters the message down for all of them.
- **Nothing consistent on the calendar.** The goal is a steady flow of first meetings without you chasing them by hand. Right now the flow depends on how much manual work goes in that week.

My take: the service and the delivery are not the problem. The gap is structural. There is no repeatable system putting Meridian in front of the right companies, segmented by what each one actually needs, before they have locked in with someone else. That is what this builds.

The goal: [TARGET MEETINGS PER WEEK] qualified first meetings per week with companies that are a genuine fit for Meridian - matched to the right service line.

Layer 1: Signal Intelligence

We don't send messages to everyone. We watch for signals that tell us a company is likely buying right now.

- Expansion signals - companies opening a second distribution site or posting warehouse and logistics roles. A live, dated reason to move now, and a direct fit for your warehousing line.
- Platform signals - companies publicly complaining about tracking visibility or running a system their customers cannot see into. A direct fit for the tracking platform.
- Contract-cycle signals - companies whose current freight arrangements are approaching renewal, where a conversation lands before the decision is made rather than after.
- Event signals - the trade shows Meridian already attends, worked as timed campaigns rather than one-off stand spend.
- Every contact is checked against Meridian's ICP before entering any campaign - sized on fit, and segmented by service line.
- Weekly signal report showing the highest-priority companies identified that week.

Layer 2: Precision Outreach

- [NUMBER OF PROFILES] profiles managed completely by [YOUR AGENCY].
- Up to [MONTHLY OUTREACH VOLUME] outreach touches per month across all profiles once warmed.
- Campaigns running simultaneously across different angles: warehouse expansion, tracking visibility, contract renewal, and pre-booking for the events you attend.
- Blank connection request first - no note. Then a signal-personalised first message based on what we found about their company.
- Warm reactivation - Meridian exports existing conversation history and we identify the relationships worth restarting.
- Suppression list honoured - any company or person Meridian is already in conversation with is kept out of the outreach.
- A/B testing across angles to find what gets Meridian into conversations fastest with each segment.
- All messages written by [YOUR AGENCY]. Dana reviews and approves sequences before anything goes live.
- Profiles warmed up before outreach begins.

Layer 3: Pipeline Infrastructure

- [THE CLIENT'S CRM] - every lead, conversation, and follow-up logged, with lifetime access. The data is yours.
- Reply classification - replies sorted automatically as interested, not now, or not relevant, so your team only sees what needs attention.
- Daily alert for every new qualified conversation, surfaced same day so no warm lead waits overnight.
- Inbox management and meeting booking - we manage the campaign inbox and book meetings straight into your calendar via a shared link. For event campaigns, we hand the warm contact straight to the person attending.
- Custom reply handling, trained on Meridian's three service lines, positioning, and common objections.
- Strategy calls every [STRATEGY CALL CADENCE] to review what is working and adjust the angles.
- Performance report every [REPORTING CADENCE]: outreach sent, reply rate, new conversations started, meetings booked.

Strategy & Refinement

- The first [CALIBRATION PERIOD] is a calibration period. We test angles, identify which segments and service lines respond, and tune the messaging.
- After that, we scale what is working and cut what is not.
- Refinement never stops. Every reply teaches us something about the market.

THE INVESTMENT

Item	Value
Monthly Fee	[YOUR MONTHLY RETAINER] per month ([STATE WHETHER SALES TAX APPLIES])
Initial Term	[INITIAL TERM LENGTH] initial term - [TOTAL FOR THE INITIAL TERM] total
Payment	[YOUR PAYMENT TERMS]
Included at no extra cost	[ANY BONUS YOU INCLUDE AT NO EXTRA COST, or delete this row]

Either party can step out after the first [BREAK CLAUSE WINDOW] if it is not working - a clean break, minimum spend of [MINIMUM SPEND]. That covers the risk on both sides. There's no separate performance guarantee: the break clause is the mechanism we agreed on the call.

THE TIMELINE

Phase	What Happens
Phase 1	Onboarding call, ICP definition per service line, signal config, profile warm-up, CRM setup, scripts drafted and approved by Dana.
Phase 2	First campaigns live across the segmented lists. Signals flowing. First outreach goes out from all profiles.

Phase	What Happens
Phase 3	Expect first positive replies and meeting bookings. Speed of response matters here - same-day follow-up boosts conversion.
Phase 4	Refinement from reply data. Highest-performing segments and service lines scaled. Underperforming angles cut or reworked.
Phase 5	Full operation. Performance reviewed against the target agreed above.
Ongoing	Long-term account-based targeting. Priority companies across all three service lines identified and worked over time. Compounding intelligence - everyone we've touched since day one stays in the system.

RESPONSIBILITIES

[YOUR AGENCY] is responsible for:

- All signal monitoring, enrichment, and ICP scoring, segmented by service line
- Profile warm-up, configuration, and sending management across all profiles
- [ANY BONUS YOU INCLUDE AT NO EXTRA COST, or delete this line]
- Writing all outreach scripts and message sequences
- Sending all outreach messages
- Inbox management - surfacing hot leads and booking meetings into your calendar
- CRM setup and data sync
- Performance reports and strategy calls at the cadence set out above
- Campaign refinement and ICP tuning based on live reply data

Meridian is responsible for:

- Attending the onboarding call and providing context, case studies, and positioning per service line
- Providing access to [NUMBER OF PROFILES] profiles with credentials shared securely
- Ensuring a nominated contact is available to respond to warm leads same day, or next morning at the latest - and, for event campaigns, to meet or call the contacts we hand over
- Reviewing and approving message sequences within [APPROVAL WINDOW]
- Keeping the suppression list current so live conversations stay protected
- Managing the internal sales process and deal closing once a conversation is started

THE TERMS

Payment. First month fee due before work begins. Activates this agreement. Subsequent payments due on the same date each month, in advance. Failed payments result in campaigns being paused immediately.

Initial Term. This is a [INITIAL TERM LENGTH] commitment with a [BREAK CLAUSE WINDOW] break. Either party can end it after that point with written notice. If Meridian ends it at the break, the minimum spend is [MINIMUM SPEND]. Cancelling early does not entitle a refund for time already served.

After the Initial Term. The agreement moves to month-to-month. Either party can end it with [NOTICE PERIOD] written notice.

No Guaranteed Outcomes. [YOUR AGENCY] commits to delivering everything in this agreement in full. Closing deals depends on factors outside our control and is not guaranteed. The break clause is the agreed risk mechanism - there is no separate performance guarantee.

Account Safety. Outreach is only sent from the agreed profiles. Personal profiles are never used without explicit written permission.

Confidentiality. Both parties keep all campaign details, contact lists, signal configurations, and messaging private - during the engagement and for [CONFIDENTIALITY TAIL] after it ends.

Intellectual Property. All messages and sequences become Meridian's property once paid in full. [YOUR AGENCY] keeps ownership of its systems, frameworks, and signal detection methodologies.

Governing Law. This agreement is governed by the laws of [YOUR GOVERNING LAW].

SIGNATURES

SERVICE PROVIDER [YOUR LEGAL ENTITY] [YOUR NAME], [YOUR TITLE]	CLIENT Meridian Freight Systems Dana Whitfield, Commercial Director
SIGNATURE / DATE	SIGNATURE / DATE

Electronic signatures (including typed names or email confirmations) are considered legally binding. Questions? Contact [YOUR EMAIL] · [YOUR WEBSITE]