

New customer engagement letter template

This template should be used for all new customers before any sales take place. Remove all the blue instructional text and replace it with your business details.

Date: (Insert date of letter here)

(Insert name of your business here)

(Insert address of your business here)

(Insert name of business contact here)

Dear (Insert name of customer here)

Thank you for your interest in becoming a customer of (Insert name of your business here). It is the policy of our business that a 'New Customer Engagement Letter' is completed by all our new customers. This letter sets out our terms of engagement. Please read it and make sure you understand the scope of our engagement.

If the terms of our engagement are acceptable, please sign the enclosed copy of this engagement letter and return to our office. Please contact this office immediately if you do not understand, or wish to discuss, any aspect of the terms of this engagement.

Purpose and Scope

The engagement of (insert your business name here) is to provide (insert customer name here) with the following:

(insert list of products or services here if relevant)

For products provided you might like to include the following statement:

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The attached schedule provides a list of those products supplied to (insert customer name here)

For services provided you might like to include the following statement:

Subject to any agreement to the contrary, the work is limited to the above services noted.

The engagement will include the operations and procedures of the (insert customer name here) as detailed below:

(insert detail of customer commitments here if relevant, such as access to documents to complete work, specific design documents for manufacture of product, provision of authorised purchase order etc. here.)

Responsibilities

(Insert your business name here) will ensure that all products/services are provided in accordance with agreed timeframe (as noted on purchase order) and to a professional standard.

The following paragraph should be completed where services are being provided to new customers

Clients are required to arrange for reasonable access by us to relevant individuals and documents, and shall be responsible for both the completeness and accuracy of the information supplied to us.

Period of Engagement

This engagement will start upon acceptance of the terms of engagement by (Insert customer name here) as noted by execution of this letter (insert completion date if relevant).

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Confidentiality

In conducting this engagement, information acquired by us in the course of the engagement is subject to strict confidentiality requirements. That information will not be disclosed by us to other parties except as required or allowed for by law, or with your express consent.

Estimated Pricing

Unless otherwise stated in writing, any estimates which we provide to you of our anticipated fees, disbursements and charges for any (insert either the words products or services here) are only indicative of the amounts you can expect to be charged. Estimates are not quotes and are not binding on us.

Professional Fees

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The fee arrangement is based on the expected amount of time and the skill level of staff required completing the services at the respective hourly rates. Where quotations have been provided for specific services, these quotations will provide adequate detail of all time and allocated staff and rates. In the event that circumstances of the services to be provided change from the original quotation, a new quotation between the two parties will be agreed before any further work is undertaken.

Terms of Trade

The terms of payment are strictly (insert payment terms here e.g. 30 days from invoice). An itemised account of all charges, costs and disbursements will be provided on the invoice. Accounts overdue by (insert number of days here) days incur a (insert an interest charge or amount for overdue accounts here) administration fee. If we incur any costs of collection, such as legal fees and collection agency fees etc., you agree to indemnify us for all such costs. Terms of trade must be agreed to prior to commencement of sales transactions between (insert your business name here) and (insert customer name here).

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Once you are satisfied with the terms of our engagement, would you please sign and date both copies of this letter.

One copy should be forwarded to us as evidence of your acceptance of the terms of our engagement. You should retain the other copy as your evidence of our engagement.

We thank you for the opportunity to provide (insert product or service here) to you and your business and we look forward to developing a strong relationship with you for many years to come.

Yours Sincerely,

(Insert business contact name here)

(Insert your business name here)

We, (insert customer name here), agree to all of the terms and conditions as noted in this letter.

..... (Authorised signature of customer to sign)

..... (Printed name of authorised signature of customer).

..... (Insert date of signing).