

Documents to discuss before signing

A practical checklist for the proposal, agreement, and any project-specific review.

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The core project documents

- Project brief: the goal, current workflow, systems, and priorities.
- Proposal or statement of work: deliverables, exclusions, responsibilities, milestones, and acceptance criteria.
- Commercial terms: build and recurring fees, usage costs, payment schedule, change process, and cancellation terms.
- Services agreement: the actual legal terms to be reviewed and signed by authorised people.

Additional documents when relevant

- Confidentiality agreement before confidential exchanges, where required.
- Data-processing terms and provider, retention, or hosting details for the proposed data flow.
- Security questionnaire, vendor registration information, and supporting evidence requested by your review team.
- Agency delivery arrangements, IP and licence terms, or service levels appropriate to the scope.

Request the right version

This public library provides preparation guides and blank working templates. Executable contracts, signed terms, private company records, and project-specific security details are shared directly when appropriate. Tell your Swepety contact which documents your organisation needs. The signed documents govern the engagement.

Your checklist

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- ☐ Identify the signing authority.
- ☐ List your procurement requirements.
- ☐ Check the scope and fee schedule.
- ☐ Resolve questions before signing.

A USEFUL NEXT STEP

Email the team with your document checklist and proposed project scope.

Your signed proposal and agreement define the final scope, fees, responsibilities, and terms.

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