

RECURRING REVENUE TEMPLATE

Monthly Retainer Agreement Template

A retainer that renews because the client can see what they bought, with a scope boundary that survives the third month.

Retainers die one of two ways: the client cannot tell what they are paying for, or the scope quietly expands until the margin is gone. This template fixes both. It defines the retainer as capacity or outcomes rather than vague availability, caps what rolls over, and builds in the review that keeps renewal from being a surprise.

WHAT'S INSIDE

- | | |
|---------------------------------|---|
| 01 How to use this template | 07 Service levels and reporting |
| 02 Choosing your retainer model | 08 Pause, termination, and IP |
| 03 Parties and term | 09 Schedule A - the monthly deliverable |
| 04 Scope of the retainer | 10 Signature page |
| 05 Hours, rollover, and overage | 11 The quarterly renewal review |
| 06 Fees, renewal, and increases | |

How to use this template

The contract is the easy part. Choosing the right retainer model is what determines whether it renews.

- 1 Pick your model first** using the next page. The clauses change depending on whether you are selling hours, outcomes, or access.
- 2 Fill Schedule A before you quote.** If you cannot describe what lands on the client's desk each month, the client cannot justify the invoice internally.
- 3 Set the review cadence, then honour it.** Retainers are not cancelled in month twelve. They are cancelled in month three, quietly, and announced in month twelve.
- 4 Price the increase in from day one.** An annual uplift clause is normal and uncontroversial when it is in the original agreement. Asking for a raise later is neither.

THIS IS NOT LEGAL ADVICE

Gatilab is a WordPress and search agency, not a law firm. Have a qualified lawyer review this agreement before using it commercially, particularly the auto-renewal and notice provisions, which are regulated in some jurisdictions.

THE RENEWAL TEST

At any point in the engagement, could your client answer 'what did they do for us last month' without opening an email? If not, the reporting in Article 6 is doing no work, and the retainer is running on goodwill.

Choosing your retainer model

Four models, four different failure modes. Pick the one whose failure mode you can actually manage.

MODEL	WHAT THE CLIENT BUYS	FITS WHEN	FAILS WHEN
Capacity	A block of hours each month	Work is varied and hard to predict	Client counts hours instead of results
Outcome	A defined monthly deliverable	The output is repeatable and visible	Effort varies wildly month to month
Access	Priority response and advice	You are the trusted expert on call	Quiet months feel like paying for nothing
Managed service	An operational responsibility	Something must not break	Scope creeps into adjacent systems

Your choice

MODEL SELECTED

MONTHLY FEE

MINIMUM TERM

CAPACITY RETAINERS INVITE THE WRONG CONVERSATION

The moment a client can count your hours, they will benchmark them against a freelancer's rate. Outcome and managed-service retainers move the discussion to what was delivered, which is the ground you want to compete on.

If you must sell hours, report on outcomes anyway.

Parties, term, and renewal

START DATE DD / MM / YYYY	MONTHLY FEE Amount	GOVERNING LAW Jurisdiction
------------------------------	-----------------------	-------------------------------

PARTY	LEGAL NAME	ADDRESS	PRIMARY CONTACT
Client			
Supplier			

1 Engagement

The Client engages the Supplier to provide the services described in Schedule A on a recurring monthly basis (the "Retainer").

The Retainer is a capacity / outcome / access / managed service arrangement as described in Schedule A.

2 Term, renewal, and notice

Minimum term. The Retainer runs for an initial term of 3 months from the start date. Neither party may terminate for convenience during the initial term.

Renewal. After the initial term, the Retainer continues month to month until either party gives 30 days written notice.

Notice takes effect at the end of a billing month. Notice given mid-month does not reduce that month's fee.

Annual review. The fee is reviewed every 12 months and may increase by up to percentage percent on 60 days written notice. The Client may terminate without penalty if it declines the increase.

Scope, hours, and overage

3 Scope

The Supplier will provide the services listed in Schedule A. Anything not listed there is out of scope and is quoted separately as project work.

Out of scope by default: new site builds or redesigns, migrations, work on properties other than those named in Schedule A, paid media management, content production beyond the volume stated, and emergency work outside business hours.

4 Hours, rollover, and overage

Included capacity. The Retainer includes number hours per calendar month.

Rollover. Unused hours roll over for 1 month only, up to a maximum of number hours. Rolled-over hours are used before the current month's allocation. Nothing rolls over past that point and no unused hours are refundable.

Overage. Work beyond the included capacity is billed at rate per hour. The Supplier will notify the Client before exceeding the monthly allocation and will not proceed without written approval.

Minimum increments. Time is recorded in 15 minute increments.

WHY ROLLOVER HAS TO BE CAPPED

Uncapped rollover turns a retainer into a savings account the client can spend all at once. Six quiet months followed by a demand for sixty hours in January is a capacity problem you agreed to in writing.

One month of rollover keeps it fair without making it a liability.

Fees, service levels, and reporting

5 Fees and payment

The monthly fee is amount , excluding VAT / GST / sales tax , invoiced in advance on the first business day of each month and payable within 7 days.

Preferred payment method is direct debit / standing order / card on file .

The Supplier may suspend services on any account more than 14 days overdue.
Suspension does not reduce the fee for that month.

6 Service levels and reporting

The Supplier will meet the response times below during business hours (hours, timezone , Monday to Friday, excluding public holidays).

REQUEST TYPE	FIRST RESPONSE	RESOLUTION TARGET
Site down or critical failure	<u>2 hours</u>	
Functional bug, site operational	<u>1 business day</u>	
Change request or new task	<u>2 business days</u>	
General question	<u>2 business days</u>	

REPORTING IS THE RENEWAL MECHANISM

The Supplier will provide a written monthly report covering work completed, hours used against allocation, results against the agreed measures, and what is planned next. This report is what your client's finance team sees when they question the line item.

Pause, termination, IP, and general terms

7 Pause

The Client may pause the Retainer once per 12 month period for up to 2 months, on 30 days written notice. Unused hours do not accrue during a pause and the Supplier does not guarantee the same capacity on resumption.

A pause longer than 2 months is treated as termination.

8 Termination

Either party may terminate on 30 days written notice after the initial term, or immediately for material breach not cured within 14 days of notice.

On termination, the Supplier will provide a handover pack containing credentials, documentation, and work in progress within 10 business days of the final payment clearing. Fees for the final month are not pro-rated.

9 Intellectual property

Work product created under the Retainer transfers to the Client on payment of the invoice covering the month in which it was created.

The Supplier's pre-existing tools, templates, scripts, and processes remain the Supplier's property. Where they form part of a deliverable, the Client receives a perpetual non-exclusive licence to use them as part of that deliverable.

10 General

- **Liability** is capped at the total fees paid in the 3 months preceding the claim. Neither party is liable for indirect or consequential loss.
- **Confidentiality** applies during the engagement and for 3 years afterwards.
- **Non-solicitation** of each other's staff applies during the engagement and for 12 months afterwards.
- **No guarantee of results.** The Supplier does not warrant specific rankings, traffic, or revenue outcomes.
- **Entire agreement**, governed by the laws of jurisdiction.

What lands on the client's desk

This is the page the client rereads before deciding whether to renew. Write it so someone who was not on the sales call can understand what they are buying.

A1. Properties covered

PROPERTY OR SYSTEM	WHAT WE ARE RESPONSIBLE FOR

A2. Monthly deliverables

DELIVERABLE	VOLUME OR FREQUENCY	DELIVERED BY

A3. What success looks like

MEASURE	BASELINE AT START	TARGET	REVIEWED

Signature page

The parties agree to be bound by this Agreement and Schedule A attached to it.

MONTHLY FEE	INCLUDED HOURS	INITIAL TERM ENDS

FOR THE CLIENT

Signature

Printed name

Title

Date

FOR THE SUPPLIER

Signature

Printed name

Title

Date

The quarterly renewal review

Diarise this now, for every quarter of the engagement. Run it as a scheduled conversation, not a rescue mission.

- ☐ Client can state, unprompted, what they got in the last three months
- ☐ Hours used is between 70 and 110 percent of allocation. Outside that range, the fee is wrong
- ☐ The measures in Schedule A3 have moved, or you can explain why not
- ☐ Nothing has quietly entered scope without entering the fee
- ☐ You have named what you would do next quarter with a larger budget

We build the systems behind the paperwork

Gatilab is an independent WordPress and search agency. We build sites, rank them, and stay long enough to prove the work moved something.

2014 Founded	850+ Clients served	2,000+ Projects completed	10,000+ Plugin installs
------------------------	-------------------------------	-------------------------------------	-----------------------------------

What we do

WordPress engineering

Custom themes, blocks, plugins, and migrations built to stay fast and maintainable after handoff.

SEO strategy

Technical fixes, topical coverage, and search visibility work measured against clicks, not scores.

Content marketing

Research-led articles and editorial systems your team can keep publishing without us.

Conversion design

Landing pages, service pages, and forms designed around the decision the reader is actually making.

Need this handled instead of templated?

Send the problem, not a brief. We will tell you whether it is worth building, what it depends on, and what we would deliberately skip. If the honest answer is that you do not need us, you will get that too.

[Start a project](#)

gatilab.com/connect

USE IT FREELY

Free to use, edit, and adapt for your own business and your own clients. No attribution required, no sign-up. The one thing we ask: do not resell it as your own product.