

## **POLICIES & PROCEDURES**

### **Hours of operation:**

Monday thru Friday from 9.00 am to 5.00 pm EST.

I am available via email contact, messaging, and telephone/Zoom/Hangout calls during standard business hours.

### **Chargeable Hours**

Any agreed services (including scheduled telephone/Zoom/Hangout calls etc.) will fall under chargeable hours.

Written communication with the client, such as email and text messages, will not be billed.

### **Communication**

Email is preferred but texting and messaging through WhatsApp, Telegram, SMS, or Hangout is acceptable.

Telephone/Zoom/Hangout calls are always planned.

I respond to emails within 24 hours or on the first working day if received on a weekend or a holiday.

### **Programs/Software**

I work with Trello (project management), Dropbox (cloud storage), Google Docs & Drive (word processing & cloud storage). These programs are suitable for sharing and collaborating and clients will not be charged for my use of any of the programs.

Using a program of the client's choice is always possible, provided that the client will cover the cost.

### **Time-Tracking**

Time will be tracked in increments of one minute, rounded up to the closest minute. I use specialized software from Trello for accurate time-tracking.

### **Monthly Retainer Package**

Hours that are not used by the end of the month will not be carried over to the next month. In case of exceptional circumstances, unused hours can be used later, or they may be deducted altogether.

To request extra hours for a monthly package, the standard rate is \$50 per hour. If there is a change in the number of hours in a monthly retainer package the client will have to provide a notice of at least 30 days before the start of the next month.

### **Status Reports**

With a digital relationship, it's important to check in on each other on a regular basis. This does not happen automatically when two parties each work from a different location - it requires conscious planning. For that reason, each client with a monthly retainer package will receive a weekly update email about the status of projects, including a timesheet with the number of hours used in that week. Weekly update emails are sent out on every Friday when new project updates are available. The monthly retainer package also includes an optional monthly Zoom call in which the client's priorities, objectives and potential ideas for the future are discussed. Update emails and WhatsApp calls are also available for hourly rate clients and will largely depend on the scope of their projects.

### **Invoicing & Payment**

Clients will receive an invoice with a 30-day payment period at the beginning of the month. With a monthly retainer package, the invoice is always a month in advance of the hours. Hourly rate clients will also receive an invoice at the beginning of the month, based on the number of hours worked in the month before. Please note that, if the payment is not received before or on the due date, I am entitled to charge an additional late payment fee of 10% of the initial invoice. In the case of continued delay (14+ days overdue), services may be suspended until the payment is received.

### **Payment Methods**

Payments can be made via Venmo, PayPal (preferred) or bank transfer. If you wish to pay in a different way, your preferred options will be discussed.

### **Referral Bonus**

Referrals of new clients will be rewarded with a discount of 20% on a single invoice. This discount will be applied after the new client's first payment.

### **Meetings**

Virtual meetings are preferred, I am open to meetings on location for special occasions. Appointments are charged for meeting and travel time (based on either the monthly retainer package rate or the hourly rate).

### **Holidays & Absence**

I am not available for work on the following days:

Martin Luther King Day

President's Day

Good Friday and Easter Monday

Memorial Day

Juneteenth June 14

Independence Day July 4<sup>th</sup>

Labor Day

Thanksgiving Day and Friday After

Christmas Day to New Year's Day

In the event of holiday or travelling time off (e.g. in summer), clients will receive a notice at least two weeks in advance, unless there is an emergency. In cases where clients will be absent for indefinite period, I am requesting that you to inform me about your absence at least 14 days in advance. In exceptional and/or acute circumstances (such as illness or death in the family), however, I understand that it is clearly not possible to communicate this well in advance.

If you are a client with a monthly retainer package, extra work may be taken on before the planned period of absence. Work can also be halted temporarily, in which case any unused hours can rollover to a future month. Otherwise, I will apply a discount to deduct any unused hours from the monthly sum.

Both clients with a monthly retainer package and hourly rate clients can request a temporary assistant in case I will be absent referrals will be provided for coverage).

### **Privacy & Confidentiality**

I attach great importance to your privacy. Information will never be disclosed, loaned, leased, rented, or sold to third parties, or made public without your permission, unless I am legally obliged to do so. Personal data and information that I receive, e.g. contact form messages via the websites, newsletter subscriptions and any information from and about clients, is kept confidential. I strive to help my clients, and anyone interested in my services as effectively and efficiently as possible. The data and information I receive will therefore only be used to optimize and/or improve the services that I offer. Some non-personal data about my website visitors is collected automatically, e.g. name of the Internet service provider and web browser, which pages are visited, and length of time spent on each page. The identity of visitors remains anonymous unless they manually submit information on the website. All passwords are encrypted, and I work with Internet security and virus protection.

### **Policy & Price Changes**

I reserve the right to change this policy and the prices of my services. I may occasionally update this policy and will timely notify my clients if there are significant changes. In the case of a change in price, clients will receive a notice 30 days before any changes become effective.

### **Environment**

To make a positive contribution to the environment, I keep paper use at a minimum. For instance, invoices are sent by email and not printed and any paper as well as supplies are reused and/or recycled whenever possible.

### **Agreement & Termination**

I do not work with a contract, but I do ask all clients to sign an agreement to protect our work relationship. Work will commence after the agreement has been read, understood, and signed. The agreement is non-binding and does not oblige us to commit to a long-term partnership; either of us is free to terminate the work relationship. I kindly request all clients with a *monthly retainer package* to send a notice of termination at least 30 days in advance if they do wish to terminate the partnership. Please note that there will be no refunds without a 30-day advanced termination notice.

*NB This page contains some affiliate links for programs/software that I use in my work. Affiliate links allow me to earn a small commission on purchases but will never add any extra costs for you.*

*NB Due to the constantly evolving nature of the internet, some links may become unavailable over time. If you happen to come across an old link, feel free to send me an email via the page [‘Contact’](#) and I will look into it.*