

pax8Academy

CONTRACTS & AGREEMENTS

Syllabus

Last updated: August 2023

Course Overview

Contracts and Agreements is a two-session, live-instruction virtual course that will review the fundamental agreements, documents, and contracts that an MSP uses to define its relationship to its clients and employees.

The course will cover key fundamentals of legal best practices for your IT services business, with real-world examples of how legal documents can reinforce or undermine protection for MSPs. The classes will discuss what to consider when working with legal counsel to draft master services agreements and client-facing agreements, scopes and statements of work, and types of employee contracts.

This course is designed for owners and senior leaders of MSPs that are looking to protect their business from a legal perspective.

Please note: This course is for informational and educational purposes and does not replace the need for legal advice. Information taken from this course and incorporated into your agreements and contracts will need to be reviewed by legal counsel.

What You'll Get

- 4 hours of virtual, interactive, instructor-led content.
- Downloadable videos* of the content you can rewatch at your convenience.
- Downloadable slide decks, handouts, and additional videos.

Learning Objectives

By attending this course, Partners will learn:

- Which types of agreements are critical to successfully protecting an MSP
- The similarities and differences between internal and external agreements
- The vocabulary and definitions of legal agreements and terms
- The relationship between contracts and agreements, and how they can either reinforce or conflict with one another

*Videos will either be recordings from your session, or they may be previously recorded material in which partner faces and voices have been removed. It is recommended to attend courses live to reap the full benefits of Q&A with the instructor and class.

Schedule of Topics

Session 1:

- Agreement Overview
- Company Agreements
 - Operating agreement, employee handbook, HR service/payroll company, security vendor, insurance
- Client Agreements
 - Master Service Agreement, Attachments, Business Associate Agreement, Non-Disclosure Agreement
- Legal Relationship from employee to client
- Important Terms
 - Including: parties, liability limits and warranty disclaimer, mutuality, assignability, jurisdiction and dispute resolution, indemnification, term and termination
- Master Service Agreements
 - Demo of Pax8 Academy resource
 - MSA vs Attachments vs Proposal
 - Overview of Attachment Contents

Session 2:

- Attachments to MSA
 - Statement of Work
 - Attachment Demo
- Change Orders
- Declination Letters
- Employee Agreements
 - Job description, offer letter, employee agreement, employee handbook, promotion and performance improvement
- Legal Resources

Instructor



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Sr. Academy Peer Group Program Manager

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Additional Resources

- MSP Lawyers
 - Brad Gross – www.bradleygross.com
 - Tom Fafinski – www.virtuslaw.com
- LegalShield – www.legalshield.com
- RocketLawyer – www.rocketlawyer.com
- US Legal Forms – www.uslegaforms.com

Next Steps

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