Engagement terms checklist

The clauses a good engagement letter should cover, with a note to have a solicitor review it once. A signpost, not legal advice.

01 Clauses to cover

A good engagement letter should address all of these.

- [ ] Scope of work, with the boundaries stated plainly.
- [ ] Exclusions: the work you are not doing, including court litigation.
- [ ] Fees and payment terms.
- [ ] Intellectual property: who owns the handbooks, policies and templates you produce.
- [ ] Confidentiality.
- [ ] Data protection, cross-referred to your privacy notice from the Data Protection module.
- [ ] A limitation-of-liability cap, for example the fees paid, consistent with your PII cover.
- [ ] A "HR advice, not court litigation" disclaimer, telling clients to take independent legal advice on litigation.

02 Before you rely on it

Terms are a legal document. Get them checked once.

- [ ] Have an employment or commercial solicitor review or adapt the template once, then reuse it.

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