



Hite Labs LLC

# Master Services Agreement & Statement of Work

Heck Yeah Strategies: Operations & Automation Build

## Agreement Details

|                  |                                     |
|------------------|-------------------------------------|
| Service Provider | Hite Labs LLC, Weymouth, MA         |
| Client           | Jenn Johnson / Heck Yeah Strategies |
| Effective Date   | July 1, 2026                        |
| Hourly Rate      | \$125/hour                          |
| Project Total    | \$2,250 (all five phases)           |

## Part 1: Master Services Agreement

This Master Services Agreement governs the overall working relationship between Hite Labs LLC ('We' or 'Us') and Jenn Johnson / Heck Yeah Strategies ('You'). Specific project deliverables, timelines, and fees are detailed in Part 2 of this document.

### What Both Parties Agree To

**You:** You have the authority to enter into this agreement. You will provide assets, access credentials, and information we need when we ask for them. You will review our work and provide consolidated feedback within 3 business days of each deliverable. You agree to stick to the payment schedule outlined in Part 2.

**Us:** We have the experience to deliver everything agreed and will do so in a professional and timely manner. We will maintain the confidentiality of everything you give us.

### Services

We provide systems implementation, workflow automation, AI-assisted operations tooling, CRM configuration, and related consulting services as outlined in Part 2. Work is scoped per phase; additional work beyond scope requires a written change order.

### **Third-Party Platforms**

This engagement involves third-party platforms including Moxie CRM, Google Workspace, and Gmail. You retain full ownership and control of all accounts. We are not responsible for platform outages, feature changes, or limitations imposed by platform providers. You are responsible for maintaining any required subscriptions (including a temporary upgrade to Moxie Teams plan during the build period).

### **Intellectual Property**

All custom automation scripts, workflow configurations, prompt templates, Claude Projects, and documentation produced under this engagement are delivered to and owned by Jenn Johnson / Heck Yeah Strategies upon completion and full payment. Hite Labs LLC retains the right to use general approaches, techniques, and non-client-specific frameworks for other engagements. Neither party will share the other's proprietary business information or client data.

### **Confidentiality**

Both parties agree to keep confidential any proprietary business information, client data, pricing, and operational details shared during this engagement. This obligation survives termination of this agreement.

### **Liability**

Our total liability under this agreement is limited to the total fees paid under the applicable phase. We are not liable for lost profits, lost data, or consequential damages. We carry out work in accordance with good industry practice but cannot guarantee error-free results across all third-party platforms.

### **Termination**

Either party may terminate this agreement with written notice. Upon termination you will pay in full for all work completed to that point and we will deliver all work completed. Deposits paid for phases not yet started are non-refundable if cancellation occurs after the kickoff session.

### **General**

This agreement is governed by the laws of the Commonwealth of Massachusetts. Neither party may assign this agreement without the other's written consent. If any provision is found unenforceable, the remaining provisions remain in effect.



Hite Labs LLC

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## Part 2: Statement of Work

Heck Yeah Strategies: Operations & Automation Build

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### Project Overview

Heck Yeah Strategies is a growing marketing agency at full capacity across 15+ active clients. The business has outgrown its scrappy-phase systems and needs a structured, AI-assisted operations layer that scales without adding manual overhead. This SOW covers the full build across five sequential phases. Each phase is independently purchasable -- you can start with Phase 1 and 2 and add phases as the business grows.

The goal: a system where adding a new client in Moxie automatically creates the Google Drive folder, Gmail filter, and project task list -- so operations run without Jenn being the bottleneck, and the foundation is solid enough to hand work to a junior hire.

### Scope of Services

#### Phase 1 -- Kickoff & Build Plan | 2 hrs | \$250

- One-hour working session to map Jenn's complete client lifecycle out loud
- Define all Moxie pipeline stages and what triggers each stage transition
- Establish project cadence per client type: what an Audit, Website Project, and Retainer look like in terms of task structure and timeline
- Run Moxie Readiness Report against Jenn's live workspace -- gap analysis produced automatically via API
- Collect access: Moxie API key, temporary Teams seat, Google Drive access, admin Gmail confirmed
- Align on Phase 2 build spec before any build work begins -- Phase 2 cannot start without Phase 1 sign-off

#### Phase 2 -- Moxie Build | 8 hrs | \$1,000

- Pipeline setup: all stages created with correct stage types for accurate 12-month revenue forecasting
- Audit workflow automation: form submission -> agreement -> deposit invoice -> payment received -> onboarding email -> project created (single workflow chain)
- Project workflow automation: discovery trigger -> proposal -> agreement -> milestone invoices -> project creation

- Retainer workflow automation: project complete -> retainer proposal -> recurring invoice setup
- Project templates with pre-loaded task lists for Audit, Website Project, and Retainer types
- Client portal configuration: branding, module toggles, meeting scheduler
- Forecasting setup: opportunity stage types configured for pipeline revenue view
- Review session with Jenn before Phase 3 begins

### **Phase 3 -- Email & Drive | 2 hrs | \$250**

- Gmail filters created via Gmail API for all existing Heck Yeah Strategies clients -- emails from each client route to their labeled folder automatically
- Standard Google Drive client folder structure built and documented (Assets, Deliverables, Access-Logins, Reports)
- One sample client folder built out as the replication template
- One-page SOP for extending the pattern to other businesses (Saltwater Effect, dog collar brand)
- Note: retroactive cleanup of existing 15 client email threads is not included -- Phase 3 covers filter creation and folder structure only

### **Phase 4 -- Claude Orchestration | 5 hrs | \$625**

- OAuth setup for Google Drive API and Gmail API against Jenn's admin account
- Moxie MCP server configured with API key
- New client trigger: Moxie 'new client created' webhook -> Claude fires -> Drive client folder created from template, Gmail filter created for client domain, Moxie project created from correct template, onboarding email queued -- all in one automatic action
- Audit -> Project transition trigger: Drive /Project subfolder created, project task template loaded in Moxie
- Project -> Retainer transition trigger: Drive /Retainer subfolder created, recurring invoice initiated, retainer task template loaded

### **Phase 5 -- Recorded Walkthrough | 1 hr | \$125**

- One-hour meeting with Jenn to review every system and confirm it works as expected, including how to add a new client from Moxie through Google Drive and Gmail

### **What Is Not Included**

- Retroactive cleanup of existing 15 client email inboxes or Moxie records
- Moxie email template copywriting or brand voice customization -- Moxie's default templates remain as-is for Jenn to customize
- Written SOP or PDF documentation of any kind -- the recorded walkthrough session is the sole handoff deliverable
- Branded Google Doc or Sheet templates

- Daily task aggregation brief or morning brief build
- Junior hire onboarding documentation
- Moxie automation for task-completion or date-based triggers (not supported natively; requires Zapier/Make at additional cost)
- Social media management, content creation, or marketing deliverables
- Buildout for Saltwater Effect, dog collar brand, or course business beyond the pattern SOP in Phase 3
- Ongoing maintenance after handoff (available at \$125/hr)
- Task management digitization and delegation layer (separate future engagement)

## Client Responsibilities

- Attend Phase 1 kickoff session prepared to walk through the complete client lifecycle
- Provide Moxie API key and temporarily upgrade to Teams plan (\$40/mo) to grant Hite Labs full workspace access during Phase 2 build
- Customize Moxie email templates in your own brand voice (default Moxie templates are provided as the starting point)
- Grant Google Drive and Gmail admin access before Phase 3 begins
- Provide consolidated feedback within 3 business days of each phase deliverable
- Downgrade Moxie back to Pro plan after Hite Labs access is removed post-build

## Timeline

| Phase                     | Target    | Gate                                |
|---------------------------|-----------|-------------------------------------|
| 1 -- Kickoff & Build Plan | Week 1    | Moxie access confirmed              |
| 2 -- Moxie Build          | Weeks 2-3 | Build Plan approved                 |
| 3 -- Email & Drive        | Weeks 3-4 | Drive access granted                |
| 4 -- Orchestration        | Weeks 5-6 | Email & Drive organization complete |
| 5 -- Recorded Walkthrough | Week 7    | All phases complete                 |

Estimated total: 8-10 weeks from kickoff. Timeline contingent on timely access provisioning and feedback within 3 business days of each deliverable.

## Investment & Payment Options

Each phase is priced individually and can be purchased separately. Two payment structures are available for the full engagement.

### Per-Phase Pricing

| Phase                                 | Hours         | Price          |
|---------------------------------------|---------------|----------------|
| 1 -- Kickoff & Discovery              | 2 hrs         | \$250          |
| 2 -- Moxie Build                      | 8 hrs         | \$1,000        |
| 3 -- Email & Drive                    | 2 hrs         | \$250          |
| 4 -- Claude Orchestration             | 5 hrs         | \$625          |
| 5 -- Recorded Walkthrough             | 1 hr          | \$125          |
| <b>Full Package (all five phases)</b> | <b>18 hrs</b> | <b>\$2,250</b> |

### Option A -- Trade + Cash

Jenn Johnson provides a Full Digital Presence Audit of hite-labs.com (valued at \$1,250) in exchange for Phases 1 and 2 of this engagement (\$1,500 value). The \$250 difference is waived as a strategic partnership adjustment. Phases 3, 4, and 5 are billed at the standard cash rate.

| Item                                 | Value          | Method                                    |
|--------------------------------------|----------------|-------------------------------------------|
| Phases 1 + 2 (Kickoff + Moxie Build) | \$1,250        | Trade -- Heck Yeah audit of hite-labs.com |
| Phase 3 -- Email & Drive             | \$250          | Cash upon delivery                        |
| Phase 4 -- Orchestration             | \$625          | Cash upon delivery                        |
| Phase 5 -- Recorded Walkthrough      | \$125          | Cash upon delivery                        |
| <b>Total cash portion</b>            | <b>\$1,000</b> |                                           |

## Option B -- All Cash

Pay per phase as work is completed. Each phase invoiced upon delivery and approval. Net 14 days from invoice. 50% deposit on Phase 1 required before kickoff session.

| Payment         | Amount  | Trigger                 |
|-----------------|---------|-------------------------|
| Phase 1 deposit | \$125   | Before kickoff session  |
| Phase 1 final   | \$125   | Upon Phase 1 completion |
| Phase 2         | \$1,250 | Upon Phase 2 delivery   |
| Phase 3         | \$250   | Upon Phase 3 delivery   |
| Phase 4         | \$625   | Upon Phase 4 delivery   |
| Phase 5         | \$125   | Upon final handoff      |

Late payments subject to 1.5%/month (18% annually). Work may be paused if payment is more than 7 days overdue.  
Payment methods: ACH, Stripe, PayPal.

## Assumptions

- Jenn will upgrade her Moxie account to the Teams plan (\$40/mo) for the duration of the engagement to grant Hite Labs full workspace access, and will downgrade back to Pro upon project completion
- Google Drive and admin Gmail access are granted before Phase 3 begins
- Moxie API is available on her current Pro plan (confirmed)
- Native Moxie automations are limited to pipeline stage entry, form submission, and invoice events -- task-completion and date-based triggers are out of scope without Zapier/Make
- Phase sequencing is followed: each phase gate must be met before the next phase begins

## Signatures

By signing below, both parties agree to the terms of this Master Services Agreement and Statement of Work. Please indicate which payment option you are selecting.

| Payment Option                                                   | Select One               |
|------------------------------------------------------------------|--------------------------|
| Option A -- Trade + Cash (\$1,000 cash + audit of hite-labs.com) | <input type="checkbox"/> |
| Option B -- All Cash (\$2,750 total)                             | <input type="checkbox"/> |

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### Signed by and on behalf of Hite Labs LLC

Signature: \_\_\_\_\_

Name: Russell Hite

Title: Principal

Date: \_\_\_\_\_

### Signed by and on behalf of Heck Yeah Strategies

Signature: \_\_\_\_\_

Name: Jenn Johnson

Title: Owner

Date: \_\_\_\_\_

Both parties should keep a signed copy for their records.