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Updated version: legally aligned with the UK (England & Wales)

Remote Services Worldwide

SALES SUPPORT & LEAD GENERATION SERVICE AGREEMENT

(Sample Template: Final Agreement will be personalised for each client with hours, deliverables, and fees)

Performance Trial Package



Surivon UK

Business Solutions · Travel Planning · Interpreting

1. Parties

This Agreement is made between:

Service Provider: Mr. Wagner Victor dos Santos Pentead: Sales Support & Lead Generation Specialist (Surivon UK)

Client(s): _____

Date: _____

2. Purpose of Agreement

The Performance Trial Package is designed as a short-term performance trial for businesses that want to begin generating leads quickly without long-term commitment. This package is designed to be suitable for corporate stakeholders, including directors, managers, founders, and authorised decision-makers.

This agreement shall remain valid and in force for a period of one (1) month from the official commencement date. All services described herein form part of the contractual obligations between the Parties.

Upon completion of the Programme, the Client shall have two options: (a) to wait a period of four (4) calendar months before being eligible to purchase the Performance Trial Package again, subject to the Service Provider's approval; or (b) to immediately upgrade to the Growth Package, which provides enhanced benefits, extend support, and additional exclusive features.

This Agreement sets out the terms under which the Service Provider will deliver Sales Support, Lead Generation, CRM services, outreach services, and related business support to the Client.

It must be read in conjunction with the Surivon UK Terms & Conditions, Privacy Policy, and Terms of Sale which form an integral part of this Agreement.

3. Four Complimentary Consultations (1:1, 30 Minutes Each)

These consultations ensure alignment, clarity, and smooth execution of the client's project.

What each session typically covers:

- Session 1 (Kick-Off Call):
 - Understand client's business, target audience, sales goals, and challenges
 - Confirm communication preferences
 - Review client's existing sales process (if any)
- Session 2 (Lead Profile & Target Market):
 - Define client's Ideal Customer Profile (ICP)
 - Approve targeting criteria (industry, region, company size, job titles)
- Session 3 (Progress Review):
 - Update on leads gathered
 - Discuss meeting opportunities
 - Adjust targeting (if needed)
- Session 4 (Results Review & Next Steps):
 - Present outcomes and lead generation performance
 - Provide recommendations for scaling

- Discuss upgrade to the Growth Package

These sessions ensure continuous communication, allowing the Client to remain involved throughout the process without being overwhelmed.

4. Lead Qualification

This stage ensures that all leads provided to the client meet the agreed standards.

This includes:

- Checking whether the company fits the client' target profile
- Ensuring the contact person is a relevant decision-maker or influencer
- Verifying contact accuracy (name, email, job role, sometimes LinkedIn profile)
- Filtering out low-quality or irrelevant companies
- Prioritising leads based on relevance and potential value

Outcome: Client will receive a list of high-quality, relevant prospects rather than random or unverified leads.

5. Meeting Booking

The Service Provider will attempt to schedule calls or introductory meetings with qualified leads.

This involves:

- Communicating with interested prospects
- Scheduling a mutually available time slot
- Sending meeting reminders
- Confirming attendance
- Providing to the client the final details (name, company, time, link, notes)

Goal:

To secure meaningful business conversations, not just initial interest.

6. Follow-Ups

Many prospects respond after multiple reminders or nurtured communication.

This package includes:

- Follow-up emails to leads who showed initial interest
- Follow-up LinkedIn messages (if applicable)

- Re-engagement attempts
- Soft-touch reminders to increase reply to rates

This ensures prospects are nurtured properly during the trial month.

7. CRM Updates

A core part of the trial package is organisation and basic management of the client's sales pipeline.

In this service, the Provider will:

- Add new leads into client's CRM (HubSpot Free or their existing system)
- Update the status of each lead (e.g., contacted, replied, interested, meeting scheduled)
- Ensure key contact information is accurate and organised
- Keep client's pipeline clean, structured, and easy to navigate
- Provide notes from conversations or insights from leads (when relevant)

Benefit:

Stakeholders get a tidy, functioning CRM system prepared for future growth.

8. Services not included: Detailed Explanation

These items are important to outline so Clients understand the limits of the Performance Trial Package.

4.7 Campaign Strategy: Not Included

No full strategic campaign planning is included.

This means:

- No cold outreach scripts or sequences
- No content planning
- No funnel design
- No sales cycle optimisation

Basic guidance may occur during consultations, but full campaign strategy is reserved for higher-tier packages.

The Client acknowledges and agrees that the service package purchased includes entitlement exclusively to four (4) scheduled consultations, as expressly specified within the package description.

No additional consultations, advisory sessions, or informal support communications are included unless separately agreed in writing and subject to additional fees.

9. Full Outreach Campaigns: Not Included

The Service Provider will not run a full cold outreach campaign.

This means:

- No daily/weekly email outreach
- No large-scale LinkedIn messaging
- No multi-step automation sequences
- No A/B testing

Starter Package only includes lead research and communication for meeting booking, not full-scale outbound campaigns.

10. Custom Growth Planning: Not Included

This level of strategic development is excluded from the trial.

- Long-term sales strategy
- Revenue forecasting
- Competitive market positioning
- Custom expansion roadmaps

These are part of the Growth Package or full-scale consulting programmes.

11. Deep Sales Support: Not Included

This refers to tasks such as:

- Full proposal writing
- Advanced pitch development
- Market analysis
- Sales training
- Opportunity management
- High-level operational support

The Starter Package includes basic support, not advanced or ongoing sales involvement.

12. Exclusive Resources: Not Included

Certain proprietary tools, templates, or private materials are not provided in this package.

Examples:

- Exclusive outreach templates
- CRM automation blueprints
- Strategic sales toolkits
- Lead scoring calculators
- Market research packs

These are reserved for higher packages.

13. Payment Terms: Full Details

- Full payment of £320 must be made before the programme begins.
 - Once work starts (lead research, CRM setup, or consultation), no refunds are available.
 - After the 1-month trial, the Client must upgrade to the Growth Package to continue receiving support.
 - Any additional services beyond the listed scope require a separate fee.
 - The Client acknowledges that the upfront nature of this fee reflects the allocation of time, resources, and operational capacity reserved exclusively for the Client during the Programme.
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14. Access to Systems and Accounts

The Client agrees to provide Surivon UK with the necessary access to relevant systems, platforms, and accounts required for the execution of the services outlined in this agreement. This may include, but is not limited to:

- CRM systems
- Email marketing platforms
- Corporate email accounts
- LinkedIn or other social media accounts
- Sales automation tools

Access may be granted via secure credential-sharing tools or by creating dedicated user access for Surivon UK.

Surivon UK agrees to use all provided access strictly for the purpose of delivering the agreed services and to maintain confidentiality and data protection in accordance with applicable UK data protection regulations.

15. Term and Commencement

3.1 This Agreement shall remain in force for one (1) calendar month from the Commencement Date.

3.2 The Commencement Date shall be the later of:

- Receipt of full cleared payment; and
- Receipt of all required access credentials, approvals, and essential business information from the Client.

No services shall begin until both conditions are satisfied.

16. Scope of Services: Performance Trial Package (£320)

The Service Provider agrees to deliver the following services during the Programme term:

16.1 Lead Research and Qualification

- Targeted B2B prospect research
- Identification of businesses aligned with the agreed Ideal Customer Profile (ICP)
- Identification of relevant decision-makers or commercially influential roles
- Verification of contact information using professional research methods

Leads are subject to market availability and ICP clarity.

16.2 Introductory Outreach and Meeting Support

The Service Provider shall:

- Initiate contact with selected prospects
- Attempt to generate commercial interest
- Facilitate introductory meeting scheduling where applicable
- Provide the Client with meeting details and relevant notes

The Client acknowledges that response rates and meeting confirmations depend on third-party behaviour and market conditions.

No guarantee of a specific number of meetings is provided.

16.3 Follow-Up Communication

Reasonable follow-up attempts may be conducted within the one-month Programme to improve engagement outcomes.

16.4 CRM Setup and Organisation

The Service Provider shall:

- Add identified leads to the Client's CRM (HubSpot Free or existing system)
- Update status tracking (e.g., contacted, replied, interested)
- Maintain structured and organised pipeline records

Advanced automation, integrations, and custom workflows are excluded.

16.5 Complimentary Consultation Sessions

The Client is entitled to four (4) one-to-one consultation sessions (30 minutes each).

These sessions may include:

- Business alignment and goal clarification
- ICP refinement
- Progress review
- Strategic feedback and next steps

Unused sessions do not roll over beyond the Programme term.

17. Services Excluded

The Performance Trial Package does not include:

- Full-scale multi-step outbound campaigns
- Multi-channel outreach (Email + LinkedIn simultaneously)
- A/B testing or structured split testing
- Paid advertising
- Advanced CRM automation
- Proposal drafting or closing services
- Long-term strategic consulting
- Revenue forecasting or financial modelling
- Account-Based Marketing

Any additional services require separate written agreement.

18. Fees and Payment

18.1 The total Programme Fee is £320.

18.2 Full payment must be received prior to commencement.

18.3 Once onboarding, planning, research, CRM setup, or consultation has begun, the fee becomes non-refundable, subject to statutory rights.

18.4 If cancellation occurs within 14 days under Consumer Contracts Regulations 2013 and before work has materially commenced, refund provisions may apply.

19. Client Responsibilities

The Client agrees to:

- Provide lawful and authorised access to necessary systems
- Supply accurate business, pricing, and service information
- Approve outreach messaging before launch
- Maintain compliance with UK GDPR and applicable marketing laws
- Respond to communication requests in a timely manner

Delays in cooperation may affect campaign effectiveness and timelines.

20. Insurance

20.1 Maintenance of Insurance Coverage

The Service Provider confirms that it maintains valid and appropriate business insurance policies suitable for the nature and scope of the services provided under this Agreement.

Such insurance may include, where applicable:

- Professional Indemnity Insurance;
 - Public Liability Insurance;
 - Employer's Liability Insurance (if legally required);
 - Any other insurance deemed reasonably necessary for lawful and professional operation within the United Kingdom.
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20.2 Scope of Coverage

The insurance maintained by the Service Provider is intended to provide protection against risks typically associated with professional advisory, sales support, lead generation, CRM consultancy, and related business services.

The Client acknowledges that:

1. Insurance coverage applies only within the limits, terms, and exclusions defined by the relevant insurer;
 2. Coverage does not extend to losses caused by the Client's own actions, omissions, or unlawful conduct;
 3. Insurance does not constitute a guarantee of financial recovery for commercial losses.
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20.3 Evidence of Insurance

Upon reasonable written request, the Service Provider may provide confirmation of active insurance coverage, subject to confidentiality and policy limitations.

The Service Provider is not required to disclose full policy documentation unless legally compelled to do so.

20.4 Limitation of Insurance Reliance

The existence of insurance coverage shall not:

- Increase the Service Provider's contractual liability;
- Be interpreted as an assumption of additional risk beyond the terms of this Agreement;
- Override the Limitation of Liability clause set out herein.

Liability shall remain strictly limited as defined in this Agreement, regardless of insurance policy limits.

21. Client Insurance Responsibility

The Client is responsible for maintaining its own appropriate business insurance, including but not limited to:

- Professional indemnity (if applicable to their operations);
- Cyber liability insurance;
- Product or service liability insurance;
- Commercial risk insurance relevant to their industry.

The Service Provider shall not be liable for uninsured losses incurred by the Client.

22. Limitation of Liability

22.1 The Service Provider does not guarantee:

- Revenue outcomes
- Conversion rates
- Meeting volumes
- Sales closures

22.2 Commercial success depends on market conditions and the Client's internal sales execution.

22.3 Total aggregate liability shall be limited to the total amount paid under this Agreement.

Nothing in this clause excludes liability for fraud or personal injury caused by negligence.

23. In-Person and Remote Meetings

23.1 Availability of In-Person Meetings (London, UK Only)

The Service Provider may, at its sole discretion, offer in-person meetings exclusively within London, United Kingdom.

Such meetings shall:

1. Be scheduled in advance by mutual agreement;
2. Take place only in public venues, including but not limited to cafés or similar establishments;
3. Be conducted during agreed business hours unless otherwise confirmed in writing.

The Service Provider reserves the right to decline or reschedule in-person meetings where:

- Safety concerns arise;
 - Scheduling conflicts occur;
 - Safeguarding or compliance concerns are identified;
 - Force majeure circumstances apply.
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23.2 Complimentary First Hour

For in-person meetings:

- The first (30) minutes shall be provided on a complimentary basis.
- Any time exceeding the initial thirty (30) minutes shall be charged at a rate of £20.00 per additional half hour, calculated on a pro-rata basis where applicable.
- This applies for all packages.

Additional time charges shall be invoiced separately and payable in accordance with the Payment Terms set out in this Agreement.

23.3 Complimentary Refreshment

As a professional courtesy, the Service Provider may offer one complimentary coffee during the in-person meeting.

This courtesy:

- Is discretionary;
- Does not form part of the contractual service;
- Does not create any additional financial obligation.

23.4 Travel and Venue Costs

Unless otherwise agreed in writing:

- The Service Provider shall not be responsible for the Client's travel costs;
- Any venue-related costs beyond the complimentary refreshment shall be borne by the Client;
- Meetings held outside Central London may be subject to additional travel fees, if agreed in advance.

23.5 Online Meetings

Where the Client is located outside London, or where in-person meetings are impractical, consultations shall be conducted remotely via:

- Zoom;
- Microsoft Teams;
- Or other mutually agreed digital platforms.

Remote meetings shall:

- Be scheduled in advance;
- Be subject to the consultation time allocations included in the selected Package;
- Be governed by the same professional conduct standards as in-person meetings.

The Service Provider shall not be liable for technical disruptions caused by internet instability, platform outages, or third-party system failures.

24. Meetings & Availability

24.1 Remote Service for all Clients

Clients located in the UK and out of the country, shall receive services exclusively through remote means, including but not limited to:

- Video conferencing platforms (e.g., Zoom or Microsoft Teams);
- Telephone consultations;
- Email correspondence;
- Secure document sharing systems.

The Client acknowledges that remote delivery constitutes full and valid performance of contractual obligations under this Agreement.

The Service Provider shall not be obligated to travel outside London unless expressly agreed in writing and subject to additional fees and logistical arrangements.

24.2 Scheduling of London In-Person Meetings

In-person meetings within London shall:

1. Be scheduled by mutual agreement;
2. Be confirmed in writing (email confirmation sufficient);
3. Be subject to availability.

Failure to provide the required advance notice may result in rescheduling at the discretion of the Service Provider.

24.3 Availability Hours

Unless otherwise specified within a higher-tier Package:

- The Service Provider shall be available during standard UK business hours (Monday to Friday).
 - Weekend or out-of-hours availability shall apply only where explicitly included within the selected Package.
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24.4 No Guaranteed Immediate Response

While the Service Provider aims to respond promptly to communications, the Client acknowledges that:

- Immediate responses are not guaranteed;
 - Response times may vary depending on workload and operational capacity;
 - Urgent requests must be clearly identified as such.
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24.5 Rescheduling and Cancellations

Where a scheduled meeting requires rescheduling:

- Reasonable notice shall be provided by either Party;
 - Repeated cancellations by the Client may result in forfeiture of allocated consultation sessions;
 - The Service Provider reserves the right to reschedule due to unforeseen circumstances, including but not limited to illness, force majeure, or safeguarding concerns.
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25. Confidentiality and Data Protection

Both Parties agree to maintain confidentiality of proprietary information.

Personal data shall be processed in accordance with:

- UK GDPR
- Data Protection Act 2018

The Client remains responsible for ensuring lawful basis for marketing activities.

26. Termination

22.1 The Client may cancel within 14 days in accordance with UK Consumer Contracts Regulations, subject to commencement status.

22.2 After the 14-day period, the Agreement is binding for the full Programme term.

22.3 Material breach (including non-payment or unlawful conduct) permits immediate termination.

27. Re-Engagement Restriction

The Client may not repurchase the Performance Trial Package within four (4) calendar months following completion.

The Client may upgrade immediately to a higher-tier package.

28. Force Majeure

The Service Provider shall not be liable for any failure, delay, interruption, or inability to perform the Services where such failure arises from events beyond the Service Provider's reasonable control ("Force Majeure Event").

Force Majeure Events include, but are not limited to:

- natural disasters (including floods, earthquakes, storms or severe weather conditions);

- fire, pandemic, epidemic or public health emergency;
- acts of government, regulatory restrictions or legal changes;
- war, terrorism, civil unrest or political instability;
- strikes, labour disputes or industrial action;
- power outages, internet failures, or telecommunications disruptions;
- failure of third-party platforms essential to service delivery.

In the event of a Force Majeure Event:

1. The Service Provider shall not be deemed in breach of this Agreement.
2. The Service Provider shall be entitled to suspend, postpone or reschedule the Services when reasonably necessary.
3. No refund shall be issued for delays, interruptions, or cancellations directly caused by a Force Majeure Event.

Where reasonably possible, the Service Provider will make commercially reasonable efforts to resume or reschedule the Services once the Force Majeure Event has ceased.

29. Governing Law

This Agreement shall be governed by the laws of England and Wales.

The courts of England and Wales shall have exclusive jurisdiction.

30. Ethical Conduct and Lawful Use

The Client agrees not to use the services for any unlawful, discriminatory, fraudulent, misleading, or unethical purposes.

The Client confirms that all products, services, claims, and representations provided for outreach are lawful, accurate, and compliant with applicable UK and international laws.

The Service Provider reserves the right to suspend or terminate services immediately where unlawful or unethical conduct is identified.

31. Intellectual Property

All outreach scripts, templates, systems, frameworks, documents, and materials developed by Surivon UK remain the intellectual property of the Service Provider.

The Client may use delivered materials for internal business purposes only.

The Client may not resell, redistribute, reproduce, or share proprietary materials with third parties without written consent.

Unauthorised use may result in legal action under applicable UK intellectual property law.

32. Entire Agreement

By signing below, the Client expressly confirms that:

1. They have read and fully understood this Agreement;
2. They agree to be bound by its terms in full;
3. They accept the Terms & Conditions, Terms of Sales, and Privacy Policy referenced herein;
4. They are duly authorised to enter into this Agreement on behalf of the company or organisation named;
5. All necessary internal corporate approvals have been obtained.
6. If any provision is held invalid, the rest remains valid.
7. No variation shall be valid unless in writing and signed by both Parties.
8. Nothing creates partnership, employment or agency relationship.

Where more than one Client signs, liability shall be joint and several unless otherwise agreed in writing.

32. Signatures

Client 1

Name: _____

Signature: _____

Date: _____

Client 2 (Optional)

Name: _____

Signature: _____

Date: _____

Service Provider

Name: Wagner Victor dos Santos Penteadó

Trading as: Surivon UK

Signature: _____

Date: _____

Legal Effect

“Survivon UK” is the trading name of Mr. Wagner Victor dos Santos Penteadó, acting as a self-employed service provider based in the United Kingdom.

This agreement shall be governed by and construed in accordance with the laws of England and Wales. Any dispute arising from this Agreement shall be subject to the exclusive jurisdiction of the courts of England and Wales.

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