

Process for the Purpose of Obtaining a Signed CEA

1. Obtain sufficient information from potential client to enable preparation of a CEA.
2. Forward CEA to client for perusal.
3. Meet with potential client to discuss the CEA and ensure all items on checklist are covered.
4. Make any necessary amendments to CEA and repeat steps 2 and 3.
5. Once satisfied client understands the CEA, send correspondence to client confirming that fact and request signed CEA be returned.
6. If changes to the terms of the CEA are required, repeat the above steps covering the changes.
7. Ensure the CEA, a record of discussions and the completed checklist are placed on file.

Checklist

Ensure that:

1. you have the correct client(s) and authorised instructor.
2. the client understands what is in/out of scope of services to be provided and in what timeframe.
3. the client understands cost of the services and any potential recovery of costs.
4. the client understands what is required of them.