

ONE STEP CENTER

STRATEGY SESSION AGREEMENT

60-minute service-fit consultation only

This Strategy Session Agreement (“Agreement”) is entered into between One Step Center (“One Step Center”) and the individual or business identified in the applicable checkout transaction (“Client”).

By checking the acceptance box and electronically signing this Agreement, the Client confirms that the Client has reviewed, understood, and agrees to be bound by this Agreement.

1. Service Overview

One Step Center provides Strategy Sessions for Clients who want to discuss their stated business systems, operational concerns, service needs, limitations, and potential fit for One Step Center services.

The Strategy Session is one 60-minute consultation conducted by telephone. A brief screen share may be used during the session when One Step Center determines that it is appropriate.

The Strategy Session is limited to:

- Clarifying the Client's stated needs.
- Discussing current systems and operational concerns.
- Identifying apparent constraints.
- Discussing which One Step Center service may be appropriate.
- Determining whether the Client and requested work may be a fit for One Step Center.

The Strategy Session does not include implementation, troubleshooting, system repair, platform training, written instructions, written recommendations, deliverables, or a commitment by One Step Center to accept the Client for another service.

One Step Center is a business systems and operational execution firm. One Step Center is not an IT help desk, hardware provider, cybersecurity provider, software-development agency, internet service provider, hosting provider, legal advisor, tax advisor, financial advisor, accounting firm, or general business consultant.

2. Website Purchase Requirement

All Strategy Session purchases must be completed through the One Step Center website unless One Step Center approves another arrangement in writing.

One Step Center does not accept inbound telephone orders, verbal orders, or informal off-platform purchase arrangements by default.

The Client must review and electronically sign this Agreement before payment is submitted.

Signing this Agreement alone does not schedule the Strategy Session or create an obligation for One Step Center to provide the session. Full payment and completed scheduling are required.

3. Payment Requirement

Full payment is required before the Strategy Session is scheduled or provided.

No partial payments, payment plans, unpaid bookings, or unpaid session holds are available unless One Step Center approves another arrangement in writing.

The Strategy Session fee is non-refundable, including when the Client:

- Cancels the session.
- Fails to schedule the session.
- Fails to attend.
- Arrives late.
- Provides incomplete intake information.
- Decides not to purchase another service.
- Determines that One Step Center is not the desired provider.
- No longer needs or wants the session.
- Cannot participate for a personal, business, technical, scheduling, or financial reason.

The Strategy Session fee is **not credited, deducted, transferred, applied, or otherwise used toward any other service, project, add-on, retainer, platform fee, subscription, or purchase.**

Payment for a Strategy Session does not reserve, secure, or guarantee availability for any other One Step Center service.

4. Scheduling and Intake Requirements

After payment, the Client is responsible for scheduling the Strategy Session through the booking link or other scheduling process provided by One Step Center.

The Client must complete any required intake form before the scheduled session.

The intake form may request:

- The Client's business information.
- Current systems and platforms.
- Current operational concerns.
- The purpose of the Strategy Session.
- Relevant business constraints.
- Additional information One Step Center needs to prepare.

The Client should have a list of relevant systems available during the session and should be prepared to access applicable platforms if a brief screen share becomes appropriate.

If the Client does not complete the required intake information, One Step Center may:

- Proceed based on the available information.
- Limit the discussion.
- Decline to review certain topics.
- Reschedule the session at its discretion.

Incomplete intake information does not make the fee refundable.

5. Scope of the Strategy Session

The Strategy Session is a service-fit consultation only.

The session may include discussion of the Client's stated systems, operational concerns, general constraints, and potential One Step Center service options.

The Strategy Session does not create an obligation for One Step Center to provide any additional service.

One Step Center may determine during or after the session that:

- The Client is not an appropriate fit.
- The requested work is outside One Step Center's service boundaries.
- One Step Center does not support the applicable platform.
- One Step Center does not have the required availability.
- The requested service presents an unacceptable risk.
- One Step Center otherwise does not wish to accept the work.

The Client is not guaranteed acceptance for Business Systems Setup, Operations Audit, Emergency Systems Rescue, a retainer service, or any other One Step Center service.

Any additional service requires a separate completed and paid transaction and the applicable service agreement.

6. Items Not Included

The Strategy Session does not include:

- Business Systems Setup.
- Operations Audit.
- Emergency Systems Rescue.
- Business consulting.
- Operational implementation.
- System implementation.
- System configuration.
- CRM configuration.
- Workflow design or building.
- Automation development.
- Integration setup.
- Troubleshooting.
- System repair.
- Website review or website work.
- Technical support.
- Platform training.
- Staff training.
- Live walkthroughs.
- Written reports.
- Written summaries.
- Written recommendations.
- Roadmaps.
- Action plans.
- Documentation.
- Deliverables.
- Step-by-step instructions.
- Follow-up work.

- Ongoing advisory services.
- Vendor management.
- Legal, tax, accounting, or financial advice.
- Cybersecurity services.
- IT or hardware support.
- Software development or custom coding.
- Platform subscriptions, licensing, hosting, domains, software fees, advertising spend, or third-party costs.

One Step Center is not required to tell the Client how to repair, configure, build, automate, integrate, manage, or correct a system, platform, workflow, website, advertisement, process, or operational issue during or after the Strategy Session.

7. Remote Delivery and Communication

The Strategy Session is conducted remotely by telephone.

One Step Center may initiate the session call from a private, blocked, restricted, or unidentified telephone number.

The Client is responsible for:

- Providing a correct telephone number.
- Being available at the scheduled time.
- Ensuring the Client's device can receive the call.
- Participating from a location suitable for a professional business discussion.
- Having relevant information available.

Official scheduling and service communication takes place through email, approved chat, forms, calendar tools, or another approved written method.

Material requests, disputes, cancellations, and rescheduling notices must be submitted through an approved written channel.

Social-media messages, personal text messages, informal telephone messages, and verbal discussions are not official service channels unless One Step Center confirms otherwise in writing.

8. Client Responsibilities

The Client must:

- Provide complete and accurate information during checkout, intake, scheduling, and the Strategy Session.
- Confirm that the signer is authorized to act for the listed business.
- Schedule the session using the approved scheduling process.
- Complete required intake before the scheduled session.
- Attend on time.
- Participate professionally.
- Maintain responsibility for all business and purchasing decisions.
- Independently evaluate any platform, product, vendor, or service discussed.
- Avoid recording the session without One Step Center's prior written consent.

One Step Center is not responsible for incomplete or unsuitable discussion caused by inaccurate, incomplete, withheld, or misleading information provided by the Client.

9. Rescheduling, Cancellation, and No-Show Policy

The Strategy Session fee is non-refundable.

The Client may request rescheduling through the scheduling system or another approved written channel.

A rescheduling request should be submitted at least 24 hours before the scheduled session.

Rescheduling is subject to One Step Center's availability and approval.

One Step Center may determine that a late rescheduling request, repeated rescheduling, or failure to follow the scheduling process constitutes a missed session.

If the Client:

- Does not attend.
- Cannot be reached.
- Arrives too late for a meaningful session.
- Is unprepared to participate.
- Does not provide required intake information.
- Ends the session early.
- Experiences a Client-controlled technology or telephone problem.

The fee remains non-refundable.

One Step Center may decide, in its sole discretion, whether to provide another booking opportunity. A discretionary rescheduling does not create an entitlement to future rescheduling.

If One Step Center must cancel the Strategy Session and does not provide a reasonable rescheduling option, One Step Center may issue a refund.

10. No Guarantees

The Strategy Session is based on the information reasonably available during the session.

One Step Center does not guarantee:

- That a specific service will be recommended.
- That One Step Center will accept the Client for another service.
- That a platform or system can be configured, repaired, or improved.
- That every issue or constraint will be identified.
- That the Client will achieve a particular result.
- Revenue, leads, sales, growth, profitability, cost savings, return on investment, conversion rates, advertising results, software performance, or employee performance.

Any discussion concerning potential services, timelines, platforms, improvements, or outcomes is preliminary and does not replace the applicable paid service, Purchase Record, or service agreement.

11. Confidentiality and Intellectual Property

One Step Center will treat nonpublic Client information shared for the Strategy Session as confidential.

Confidential information does not include information that:

- Is publicly available through no breach of this Agreement.

- Was lawfully known before disclosure.
- Is independently developed without use of the Client's confidential information.
- Is lawfully received from another source.
- Must be disclosed by law, court order, or governmental requirement.

One Step Center may disclose information to employees, contractors, or service providers who reasonably require access to provide or administer the Strategy Session and who are subject to applicable confidentiality obligations.

The Client retains ownership of the Client's information and materials.

One Step Center retains ownership of its:

- Methods.
- Frameworks.
- Processes.
- Templates.
- Service structure.
- Internal documentation.
- Know-how.
- Proprietary materials.

The Client may not record, copy, reproduce, publish, distribute, resell, sublicense, or commercially exploit One Step Center's proprietary information without written permission.

12. Dispute Resolution and Governing Law

A dispute will be reviewed against:

- This Agreement.
- The completed and paid checkout transaction.
- Scheduling records.
- Payment records.
- Relevant written communications.

Verbal agreements and informal communications are not binding.

The dispute process is:

1. The Client submits the dispute through an approved written channel and identifies the issue and requested resolution.
2. One Step Center reviews the submission within three Business Days.
3. One Step Center provides a written response within five Business Days after completing its initial review.
4. The parties attempt good-faith resolution for 10 Business Days after One Step Center's response.

Any unresolved dispute will be handled under the applicable dispute-resolution provisions in the One Step Center Terms and Conditions, provided those provisions are enforceable and do not conflict with this Agreement.

This Agreement is governed by the laws of the State of Florida, without regard to conflict-of-law principles.

13. General Terms and Electronic Acceptance

The Client may not assign or transfer the Strategy Session without One Step Center's written approval.

One Step Center performs services as an independent contractor. Nothing in this Agreement creates an employment, agency, partnership, fiduciary, or joint-venture relationship.

One Step Center may use employees and contractors to administer or provide the Strategy Session.

Failure to enforce a provision does not waive the right to enforce it later.

If any provision is invalid or unenforceable, it will be enforced to the maximum extent permitted by law, and the remaining provisions will remain effective.

This Agreement, the applicable checkout transaction, and the One Step Center Terms and Conditions constitute the entire agreement concerning the Strategy Session.

No intake response, email, chat, call, verbal statement, or informal communication modifies the scope of the Strategy Session.

The Client consents to entering into this Agreement electronically and receiving contractual and service communications electronically.

By electronically signing, the Client confirms that:

- The Client has reviewed and understood this Agreement.
- The Client agrees to be bound by it.
- The signer is authorized to act for the business identified during checkout.
- The electronic signature is intended to have the same effect as a handwritten signature.
- The Client has had an opportunity to retain or print a copy of this Agreement.

ACCEPTANCE STATEMENT

By checking the box below and signing, I confirm that I am authorized to enter into this Agreement for the business listed. I understand that the Strategy Session is one 60-minute service-fit consultation only and does not include implementation, troubleshooting, training, written reports, summaries, roadmaps, instructions, or other deliverables.

I understand that the Strategy Session fee is non-refundable. I also understand that the Strategy Session fee will not be credited, deducted, transferred, applied, or otherwise used toward any other service, project, add-on, retainer, platform fee, subscription, or purchase.

I understand that purchasing a Strategy Session does not guarantee that One Step Center will accept me or my business for another service. Any additional service requires a separate completed and paid transaction and the applicable service agreement.