

Understanding the MSA (CSM team)

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This article provides CSMs with working knowledge of the Bold Group Master Services Agreement (MSA). While CSMs do not negotiate or interpret contracts, understanding the MSA helps us set accurate expectations with customers, recognize when to escalate questions, and align our actions with the terms agreed to by both parties.

The MSA can always be accessed at: <https://www.boldgroup.com/legal>

Why the MSA Matters to CSMs

- Framework for all customers – The MSA governs every Bold Group relationship; it establishes rights, responsibilities, and limitations.
- Consistency – Ensures all customers receive services under the same legal and operational framework.
- Guardrails – Protects Bold Group and customers by defining scope of services, liabilities, and obligations.

Key Areas CSMs Should Be Aware Of

(High-level only – CSMs should never provide legal interpretation.)

- Billing & Fees – Order Forms and SOWs specify what is purchased; recurring fees typically begin on dates outlined in the MSA/Order Form.
- Support & SLAs – Outlines what “support” includes (break-fix, product updates) vs. what requires Professional Services; defines Bold Group’s service level commitments.
- Term & Renewal – Renewal cycles, notice requirements, and termination rules are defined here.
- Limitations of Liability – Caps Bold Group’s liability and clarifies customer responsibilities.
- Data & Compliance – Customer data handling, confidentiality, and compliance obligations are referenced.

CSM Responsibilities

CSMs are not contract negotiators—but we play an important role in upholding and reinforcing the MSA:

Do:

- Know where to find it – Bookmark <https://www.boldgroup.com/legal>.
- Set expectations based on scope – Reference the MSA when explaining what is covered under support vs. what requires a project/SOW.
- Escalate customer questions – If a customer asks about renewals, terminations, or legal obligations → direct to Sales or Legal.
- Use it during the journey – The Customer Journey Map identifies MSA as a key touchpoint during procurement.

Don't:

- Interpret or explain legal language.

- Commit to anything outside of what's in the MSA, SOW, or Order Form.
- Modify, summarize, or send “unofficial” copies of the MSA.

When the MSA Comes Up in the Customer Journey

- Decision/Procurement Stage – Customer reviews MSA with Sales/Legal before signing.
- Onboarding – Fees, payment terms, and project start are tied to MSA/Order Form acceptance.
- Adoption/Support – Customer expectations of support and SLAs trace back to the MSA.
- Renewal – Renewal dates, notice windows, and termination language come directly from the MSA.

Quick Reference: CSM Role with the MSA

- Be familiar: Understand high-level purpose and clauses that affect customer experience.
- Be careful: Never interpret or provide legal advice.
- Be proactive: Escalate any MSA-related questions to Sales/Legal immediately.
- Be consistent: Align all customer interactions with what the MSA allows.

In summary: The MSA is our guardrail. CSMs don't negotiate it, but we uphold it daily through expectation-setting, escalation, and ensuring we never commit to something outside of its scope.