

# Where Shall We Start?

# Statements of Work Clarify Outcomes & Approaches

- Consultants use Statements of Work (SoWs) to clarify projects
  - SoW: “the document that captures and defines all aspects of your project. You’ll note the activities, deliverables and the timetable for the project. It’s an extremely detailed document as it will lay the groundwork for the project plan.” [From this page](#), which has a nice table of full SoW elements
  - [Scope](#): “features and functions of a deliverable needed to finish a project.”
- [We have a simple form](#) to structure your thinking and agreements with clients

# Statement of Work - Sample

Local Innovation Works

**STATEMENT OF WORK ("SoW")**  
for  
[Name] ("[Name Short]")  
from  
Local Innovation Works ("LIW")  
Issued [Month Day], 2020

**I. SERVICES**

The focus of our work will be to [Focus]

Approach:

- Discover** - current state, gaps and next steps to identify and remove constraints to profitable growth
- Analyze** - methodical, clear thinking yielding actionable insights
- Design** - solutions to support leadership's ability to deliver the desired results
- Build** - enablement solutions as designed
- Implement** - train leaders
- Optimize** - solutions to ensure success

**II. PERSONNEL**

Project will be delivered by [Project Lead] with support from Sloan Value Partners team.

**III. PRICING & INVOICING**

Project Fees:

- Total budget is \$XXXX - use if the client has budget available
- This does not include expenses, those will be passed through at cost on an as-pre-approved and incurred basis. [ No expenses are expected for this project.]
- Retainer is monthly and can be stopped on the first of any month, though a 90-day commitment is strongly encouraged to allow the working relationship to gain momentum.

**IV. ASSUMPTIONS**

- This SoW is based on our current best estimate based on our experience and the data provided. Inevitably, complexities arise as the project unfolds but we will communicate about these in our weekly meetings to ensure there are no surprises.
- Status and project management meetings will be held virtually and work conducted offsite
- Client will support the development of a clear understanding of how we can help create a healthy return on your investment in our services.

**V. DELIVERABLES**

- Project status meeting agenda and facilitation
- Plan and document review are requested

Confidential Page 1 of 2

Local Innovation Works

**VI. PLANNED SCHEDULE** [View](#)

Replace with unlinked paste from the planner

Workstep/Week	3/5	3/12	3/19	3/26	4/2	4/9	4/16	4/23	4/30	5/7	5/14	5/21
Project leadership support												
Project management support												

**VII. GENERAL**

Any change to this SoW shall be subject to mutual written agreement of the parties.

**VIII. ACCEPTANCE**

The parties have so agreed:

[Name] LIW

Signature: Signature:

Print Name: Print Name:

Title: Title:

Date: Date: [xx/xx]/2020

Confidential Page 2 of 2

# Elements of a Statement of Work

- **Services offered** - what will be done
- **Approach** - how the work will proceed
- **Personnel** - who will do the work
- **Pricing and invoicing** - some projects will be paid by the client
- **Assumptions** - just to be clear
- **Deliverables** - what we will deliver to mark the completion of the work
- **Schedule** - when each step of the approach will take place as a Gantt chart
- **General provisions** - anything else about the agreement
- **Signatures** - making promises to each other

