



Define and Scope Your Project Using Statements of Work



Statements of Work Clarify Outcomes & Approaches

- Consultants use Statements of Work (SoWs) to clarify projects
 - An SoW is “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 SoW form](#) to structure your thinking and clients agreements

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:

1. **Discover** - current state, gaps and next steps to identify and remove constraints to profitable growth
2. **Analyze** - methodical, clear thinking yielding actionable insights
3. **Design** - solutions to support leadership's ability to deliver the desired results
4. **Build** - enablement solutions as designed
5. **Implement** - train leaders
6. **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

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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

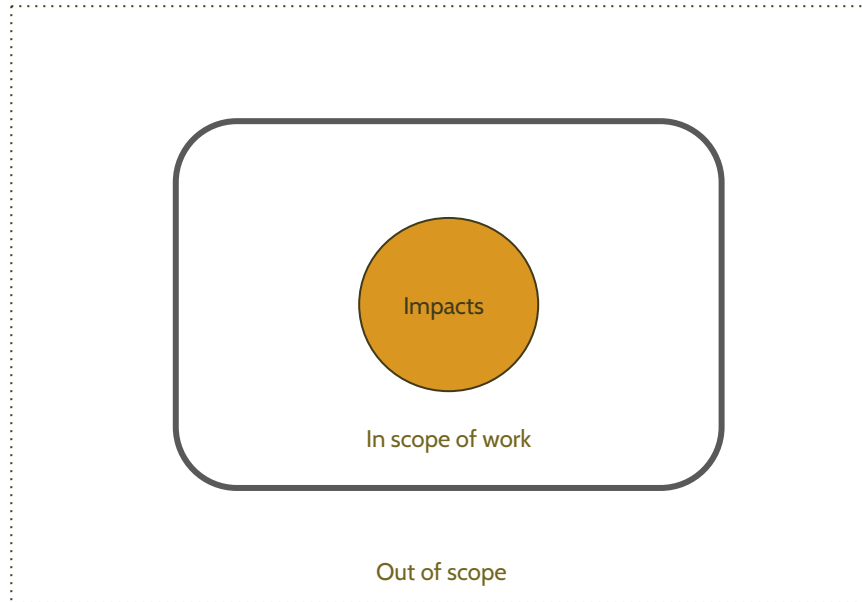
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Elements of a Statement of Work

- **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

Define The Edges of Your Project's Scope

In the Assumptions section of your SoW, clearly define your project's scope, what is included in the area of inquiry, the process, and deliverables.



Be Careful of Scope Creep As the Project Progresses

Scope creep happens when requirements move or expand

Paperwork solution, in the general provisions section we have:

NO VERBAL AGREEMENTS. There shall be no verbal agreements which qualify, modify, or supplement this Agreement. Any change to this SoW shall be subject to mutual written agreement of the parties.

Practical solutions

- Meet any sense of scope creep or murkiness with clarifying questions. Pull clarity.
- Review the SoW and deliverables with the clients every week from the midpoint to the last meeting.

Your Assignment

Begin to draft your Statement of Work

In your draft, add all the questions you have open around your

- Relevant impacts and benefits you can create for your client
- Your approach
- Deliverable requirements
- Timing

NB:

- Write your open questions right in the document [in square brackets] where the answers will go. This will allow you to quickly complete your document.
- [square brackets] are rarely used in writing, so they make an easy character to search on to find work that remains to be done in a large or critical document

