Scope of Work Template

What it is:

A scope (or statement) of work is a document that outlines all relevant information about your project including work details, schedules, terms, and expected outcomes. It's especially important when working with outside agencies or teams to agree on expectations.

Learn more and get step-by-step instructions on how to fill out your scope of work on the Planio blog.

PROJECT DETAILS

Start with some basic housekeeping. What is this? Who's responsible? When are you starting?

Project	Briefly describe the project (i.e. Homepage redesign)
Project Lead	Who is leading this on your team?
Agency contact	Who's your contact at the agency/external team?
Schedule	When is this project taking place?

PROJECT OVERVIEW & OBJECTIVES

Explain **what** you're making and **why** this project is being done now.

Project Summary:

A high-level summary of the deliverables

Business Objective/Problem Statement:

What are you hoping to achieve with this project?

How will it push your business / product forward? What problem does it solve for your company?

Context:

Why is this project being completed now? (For example, long-term product vision, change in

regulation, design update, etc...)

PROJECT SCOPE

Describe what you'll be creating, the approach you're going to take, and start to outline the specific tasks that will need to be completed.

If you don't have a full task list prepared, use phases and periodically update your SOW throughout the project.

Phase	Deliverables & Assumptions	Requirements
Wireframes	Wireframes for all pages on our main marketing site. **Not in scope:** Blog design. Web app UI.	• Design system • New sitemap • New copy
Design	TBD.	
Development	TBD.	

TASK LIST (DELIVERABLE DESCRIPTIONS)

Break down each phase into specific tasks and deliverables so everyone knows what's expected.

Phase: WIREFRAMES

☐ Design exploration and mood board

☐ Homepage wireframe

☐ About page wireframe

☐ Plans page wireframe

☐ Pricing page wireframe

☐ Features page wireframe

Notes

All designs will be provided in InVision.

PROJECT SCHEDULE & MILESTONES

Outline the contract period, milestones, and proposed schedule for the project.

It's also a good idea to include the specific deliverables to get a full picture of how the project will unfold. You can also include budget and payment information here or break that out into its own section.

Contract Period: Q2 2020 (April 1st – May 31st)

Milestone	Final Deliverables	Schedule	Approval
Project Kickoff	Signed SOW	April 1st	Project lead
Wireframes	Completed wireframes for review	April 2nd – 14th	Design lead
Homepage Design			Design lead/CTO

ADOPTION PLAN

Briefly describe how the deliverables will be put into practice and other additional needs.

For example, if you're redesigning a website, how will old pages be migrated or integrated? Are your analytics going to still work? Are you switching the domain? Uncover needs and risks here.

Deliverable	Adoption plan	Risks	In scope?
Finished website designs	• Deploy to testing environment • Run tests • Check 301 redirects • Deploy to main domain • Check conversion rates	• Broken links • Drop in SEO • Broken form fields • Sign-up flow	YES

PAYMENT INFORMATION, TERMS & CONDITIONS

Detail how the contractor will get paid, how and when reports will come, and any additional terms that should be clarified.

Payment information:

When will payments be made? Per milestone? On a set schedule?

How will payments be made? Wire transfer? PayPal?

How will increases in scope or missed deadlines be handled?

Reporting:

How and when will updates be reported? Via email?

Daily scrum meetings? In a project management tool like Planio?

Terms:

What other requirements need to be agreed on? For example, security requirements,

exclusions (i.e. what's not being done), or assumption (for example, who owns the code at the

end of the project?)

Sign-off

_____
Project Lead

_____
Agency Contact