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PROJECT MANAGEMENT 101

How to Write a Scope of Work (Example Included)

By Jennifer Bridges | Nov 20, 2020

What Is a Scope of Work?

A scope of work document is an agreement on the work you're going to perform on the project. A scope of work in project management includes deliverables, a timeline, milestones and reports. Let's look closer at each of these elements below.

Deliverables

This is what your project delivers, of course. Whether it's a product or a service, it's the reason you're executing the project for your customer, stakeholder or sponsor. Whatever that deliverable is, and it can be some sort of document or report, software, product, build (or all of the above), you need to have each item clearly identified here. Creating a [work breakdown structure](#) can help with this step.

Timeline

Think of a timeline as a road leading from the start of a project to its end. It's a section of the document that delineates the major phases across the schedule of the project's duration. It should also mark the points in the project when your deliverables are ready. As you can guess, it's essential to scoping out the overall plan of any project. This is best presented visually, like a rolled-up [Gantt chart](#) plan, so the stakeholders can see the high level timeline.

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With [ProjectManager](#), you can build a timeline in seconds with our online Gantt chart maker. Create a budget, assign tasks, add dependencies and more. Then present to your team and stakeholders to get the project moving on the right foot. Try it free today.

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Milestones

Projects can be very long and complex, which is why they're laid out over a timeline and broken down into more manageable parts called tasks. Larger phases of the project are marked by what is called a [milestone](#). It's a way to help you monitor the progress of the project to make sure it's adhering to your planned schedule. Define your key milestones on a [timeline](#) in the Scope of Work document, including project kickoffs, meetings, hand offs, etc.

Reports

You'll be generating these throughout the project, delivered to either you team or customer, stakeholder or sponsor. These can include status reports, [progress reports](#), variance reports and more. They're a formal record of the progress of your project, but they're also a means of communication beyond whether the project's on schedule or not. Depending on how you customize [START FREE TRIAL](#) wealth of data that can serve a number of different audiences. Define [how you'll be reporting on the project](#) and when the stakeholders can be expecting them and from whom.

Scope of Work Example

To understand a scope of work, let's create a hypothetical project, nothing too

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outline the deliverables, timeline, milestones and reports in this scope of work example.

Deliverables

- Invite List
- Addresses of Attendees
- Invites
- Addressed Envelopes
- Stamps

Timeline

- Jan. 1 Decided on invite list
- Feb. 1 Have addresses collected of attendees
- March 1 Pick invitation style and have printed
- April 1 Address and mail invites
- May 1 Get final count of guests
- June 1 Wedding

Milestones

- Selection of guest and collection of addresses
- Mailing of invitations
- Final count of attendees

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Reports

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- Check RSVPs against invitation list

Scope of Work Tips

But before you get to writing, you need to make sure you follow Jennifer's advice.

- 1. Be Specific:** explain the terms used clearly
- 2. Use Visuals:** a picture is worth a thousand words
- 3. Get Sign-offs:** make sure everyone who needs to okay the work, does

It's not that difficult, but it needs to be thorough, because you don't want to have to play catch-up with paperwork when you're in the heat of the project.

Pro-Tip: The SOW is essential to the [project plan](#), and is often included as part of the overall project plan, but it can be time consuming to write. Remember to use our free scope and project planning template to help save you time. The link is at the top of the page!

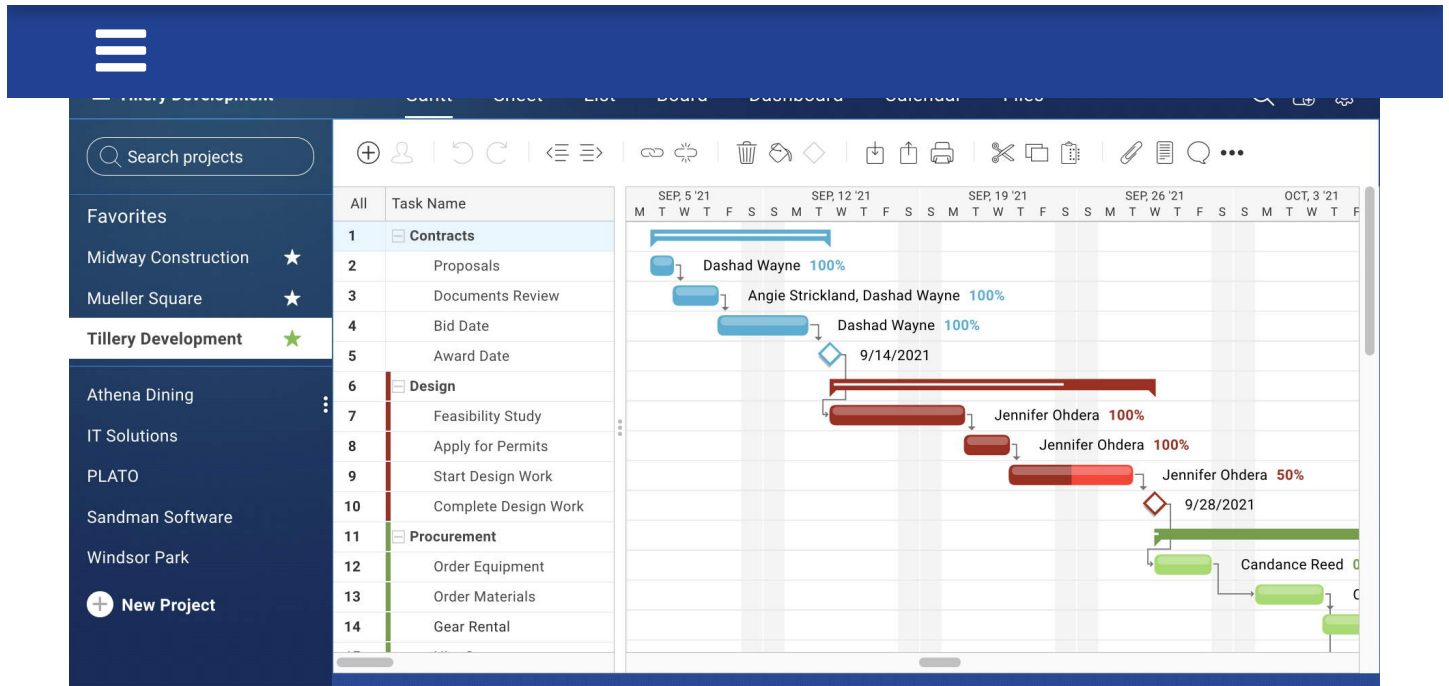
How to Make Project Plans in Project Management Software

It can feel overwhelming with so many tasks to keep track of, but project management software can simplify the process. In ProjectManager, you can import your spreadsheet or use one of our industry-specific templates to get you started.

A list of tasks is only a start. To bring order to that chaos, you'll want to estimate duration by adding start and finish dates. We then automatically put all your tasks on a timeline in our [Gantt chart project view](#), so you can see the entire project in one place. Further reign in the tasks by prioritizing them, linking dependencies to prevent bottlenecks later in the project and set milestones to break up the larger project into more manageable phases.

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Collaborate at the Task Level

Tasks need people to execute them and move your project forward. You have your schedule, so onboard your team and start assigning them to tasks. You can do this from any of our multiple project views. We offer [collaborative tools](#) that make teams more productive and help them work together. You can direct them with task descriptions and by attaching files to the task. Then, they can work together, commenting at the task level with other team members, who are notified by email. This is great for remote teams and even those working in the same room.

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Track Progress to Stay On Time and Under Budget

Speaking of distributed teams, how can you keep track of their progress if you're not able to check in on them? We solve that problem with great monitoring features, such as a [real-time dashboard](#) that shows you task progress, costs and other high-level views of the project. Our software takes status [START FREE TRIAL](#) automatically displays them in easy-to-read charts and graphs. You can even share them at stakeholder meetings to keep them in the loop.

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For more in-depth data, we feature [one-click reports](#) that can be filtered to show just the data you're looking for. Reports track project variance, workload and more. You'll catch issues and resolve them quickly before they become problems that threaten to derail your project.

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If you want that scope of work to be the beginning of a beautiful project, then try ProjectManager for [free with our 30-day trial offer](#).

VIDEO: How to Write a Scope of Work

In this video, Jennifer Bridges, PMP, shows you how to write a scope of work for project management. Follow her steps to get started or use [our project plan and](#)

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What

- Scope of Work (SOW)
An agreement on the Work to be performed.
- Includes:
 - Deliverables / Products
 - Time line
 - Milestones
 - Reports
- Template: *Project
 - 1. Glossary
 - 2. Problem Statement
 - 3. Goals
 - 4. Objectives
 - 5. Administrative
 - 6. Timeline

MUST Best Practices:

1. Be Specific
 - What Terms Mean
 - Who does what by When
 - ⊗ Traps: Confusion, Miscommunication, Disputes.
2. Use Visuals
 - What will it look like in the end.
 - What will people be able to do in the end.
 - Picture is Worth a Thousand Words.
 - ⊗ Traps: Misinterpretations.
3. Get Sign Offs
 - Ensure Authorized Approvers Sign Off.
 - Sign Off on Critical Milestones & Deliverables.
 - ⊗ Traps: Selective Amnesia, Disputes, Rework.

3:12

Here's a shot of the whiteboard for your reference!

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Transcript:

Today, we're talking about how to write a Scope of Work document and with that, I want to talk about some best practices. But before we start, I want to clarify what the Scope of Work document is.

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Some people you may hear it referenced as the SOW. Basically, it's an agreement on the work to be performed on the project. It includes what deliverables are produced or maybe even products or any results.

It also includes the timeline for this project as well as important and critical milestones and different types of reports that are needed and specifically who

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in this SOW. Also, the problem statement, a little bit more detail about the problem and what we're trying to solve. It also includes the goals, and it includes the objectives and deliverables that we'll be producing. It also includes any kind of administration information about the project as well as the timeline.

So some people reference best practices and in this case, I call these the "must" practices. So number one, be specific. You wanna be specific when you're clarifying or defining terms so that everyone has a clear understanding and common understanding of what the terms are. You also wanna be specific when you're defining who does what and by when. You want to... By doing this, you're avoiding some of the traps which could be confusion, like who's doing what and when, or what things mean, or miscommunications which ultimately can lead to some disputes.

You also want to include visuals, wanna paint the picture of what it will look like in the end once this Scope of Work, or this project, is implemented. You also wanna be able to show what people will be able to do at the end of this project by implementing this. Remember, a picture is worth a thousand words. Again, you're avoiding a trap here which has to do with misinterpretations, so the visuals help avoid that.

And the third one is getting sign-offs. You wanna ensure that the authorized approvers sign off on your scope of work document. You also want to have them sign off at critical milestones and deliverables, again, avoiding these traps. If you've ever felt like people on your team or your project get selective amnesia, well we wanna avoid that. You also want to avoid disputes and any costly rework.

So if you need a tool that can help you manage and track your Scope of Work document, then sign up for our software now at [ProjectManager](https://www.projectmanager.com).

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