# Statement of Work

**Statement of Work For**: <Project Name/Purpose>

**Document Created:** <Date>

**Author:** <Author>

**Distribution:** <Distribution List>

**Revision History**

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| --- | --- | --- |
| Revised By | Date | Comment |
| <Initials> | <Date revised> | Comments… |
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| --- | --- | --- | --- | --- |
| Start Date | End Date | Project Manager | | Client |
| dd-mon-yyyy | dd-mon-yyyy | Initials | Client/Stakeholder(s) | |

# Background

[Optional section]

If there is a background to this SOW that is relevant, possibly because it will be distributed to multiple stakeholders that are not aware of the work background then describe it here. For example: *“[client] has been experiencing difficulty identifying sources coming to their website, which makes it difficult to track marketing spend…”* This type of background is often a justification for rapid sign-off of the SOW as it highlights the commercial imperative of the recipient of the work.

# Objectives

State the high-level business objectives and proposed solution so that the two marry up, with the solution an explanation of how the objectives will be met. For example: “to implement [solution] by [development steps] so that [objectives] can be met in a timely and efficient fashion.

# Project Scope

## High-Level Requirements

List the requirements that must be satisfied in order for the project’s goals to be realised.

|  |  |
| --- | --- |
| Requirement | Comments |
| Requirement A | Delivery of A enables B to happen |
| Etc. | Etc. |

## Milestones and Deliverables

List the major project milestones and the deliverables from them

| Milestone | Deliverables |
| --- | --- |
| Milestone A | Deliverable 1 |
|  | Deliverable 2 |
| Milestone B | Deliverable 3 |
| Etc. | Etc. |

## Proposed Timeline

Lay out the timeline for delivery at a high level. *It is generally wise not to commit to dates, only to durations in a SOW, as delays in approval often occur with the deadline not shifting accordingly.*

1. Wk 1
   1. Kick off session
   2. GAP Analysis
2. Wk 2
   1. Deliver detailed technical spec for sign off
   2. Deliver database schema
3. Etc.

# Risks and Assumptions

## Risk Analysis

If you are creating a sophisticated SOW you may have a separate Risk Register. Do not link to it, instead call out the risks in a table with the column headings below:

**Risk Id**– A unique identification number [can be used to identify and track the risk in the risk register if one is in use].

**Category**–Is the risk financial (cost and/or revenue), regulatory or compliance, timeline, resource, environment, or some other key category? Categorising risks groups them and aligns them with stakeholders who are best placed to assess/mitigate and stakeholders for whom the risk is greatest.

**Description**– Describe the potential risk. For instance: *Item A cannot be completed until Item B has been purchased but approval is not yet forthcoming and there is a delivery lead time, or Item A requires resources that have not been identified and the project is currently resource constrained.*

**Potential Impact**– A quantitative rating of the potential impact on the project if the risk should materialize**.**Impact in a Risk Register should be scored on a scale of 1 – 10 with 10 being the highest impact.

## Assumptions

List all of the assumptions that are being made. For example: “*to successfully meet its goals in a timely manner with benefits reflected in the current financial year, all parties have signed-off the budget and the project will begin on the scheduled start date.”*

# Pricing

List the price, stating clearly:

1. Currency (don’t get paid in Canadian dollars when you meant US dollars!)
2. Amount
3. Payment Terms (including any staged/milestone payments)
4. If price is Fixed or Time and Materials. If the latter, then specify that there is a Rate Card in the Appendix and put it there.

Approval

This Statement of Work has been reviewed and accepted by the following people, as indicated by signature below:

*[List all individuals whose signature is required, along with their titles and/or roles on the project. As a general rule, try not to put all the text of an Approval section on a page by itself and always place it immediately beneath the pricing information.]*

|  |  |  |  |
| --- | --- | --- | --- |
| Signature: |  | Date: |  |
| Print Name: |  |  |  |
| Title: |  |  |  |
| Role: |  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Signature: |  | Date: |  |
| Print Name: |  |  |  |
| Title: |  |  |  |
| Role: |  |  |  |

# APPENDIX A - REFERENCES

Include the relevant text of any documents referenced in this SOW (for example a Rate Card if T&M). Do not link to documents outside of the physical SOW as this document forms the basis for a contractual agreement and should therefore be complete in itself.

# APPENDIX B - GLOSSARY

|  |  |
| --- | --- |
| **Term** | **Definition** |
| Any technical term used in the document | Its definition in lay terms |