



SCOPE OF WORK TEMPLATE

Workflow Automation Delivery Framework

ENTERPRISE EDITION

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Scope of Work Template

Workflow Automation Development Project

SCOPE OF WORK

Project: [PROJECT NAME]
Client: [CLIENT COMPANY]
Date: [DATE]
Version: 1.0

1. Project Overview

1.1 Background

[2-3 sentences about the client's business and context]

1.2 Problem Statement

[Describe the specific problem or challenge this project addresses]

1.3 Solution Summary

[High-level description of what will be built]

2. Objectives

The primary objectives of this project are:

1. **[Objective 1]:** [Description]
 2. **[Objective 2]:** [Description]
 3. **[Objective 3]:** [Description]
-

3. Deliverables

3.1 Workflow 1: [Workflow Name]

ATTRIBUTE	DESCRIPTION
Purpose	[What this workflow accomplishes]
Trigger	[How/when it starts - webhook, schedule, manual]
Input	[What data comes in]
Process	[What happens to the data]
Output	[What actions are taken / results produced]
Integrations	[Systems connected]

3.2 Workflow 2: [Workflow Name]

ATTRIBUTE	DESCRIPTION
Purpose	[What this workflow accomplishes]
Trigger	[How/when it starts]
Input	[What data comes in]
Process	[What happens to the data]
Output	[What actions are taken]
Integrations	[Systems connected]

3.3 Documentation Package

- [] Workflow walkthrough video (Loom)
- [] Technical documentation
- [] Credential setup guide
- [] FAQ document
- [] Workflow exports (JSON backups)

3.4 Training

- [] Handover call ([X] minutes)
- [] [Additional training if included]

4. Success Criteria

The project will be considered complete when:

#	CRITERION	MEASUREMENT
1	[Criterion]	[How we'll verify]
2	[Criterion]	[How we'll verify]
3	[Criterion]	[How we'll verify]
4	[Criterion]	[How we'll verify]

5. What's NOT Included

To maintain clear scope boundaries, the following are explicitly excluded:

- [] [Exclusion 1 - e.g., "Additional workflows beyond those listed"]
- [] [Exclusion 2 - e.g., "Integration with systems not specified"]
- [] [Exclusion 3 - e.g., "Custom UI/dashboard development"]
- [] [Exclusion 4 - e.g., "Data migration"]
- [] [Exclusion 5 - e.g., "Ongoing maintenance (quoted separately)"]

Any items not explicitly listed in Section 3 are considered out of scope.

6. Client Responsibilities

For successful project delivery, Client agrees to provide:

6.1 Access & Credentials

- [] n8n environment (Client-owned account)
- [] Admin access to required integrations
- [] API credentials for connected services

6.2 Information & Data

- ☐ Sample data/examples for testing (minimum [X] examples)
- ☐ Business rules and logic documentation
- ☐ Brand/tone guidelines (if applicable)

6.3 Availability

- ☐ Respond to questions within 48 hours
- ☐ Provide feedback within [X] business days
- ☐ Attend scheduled calls and handover session
- ☐ Designate decision-maker with authority to approve

6.4 Technical Requirements

- ☐ [Any specific technical requirements]

7. Timeline

7.1 Project Phases

PHASE	ACTIVITIES	DURATION
Setup	Kickoff, environment configuration, credential setup	[X days/week]
Development	Build workflows, implement integrations, AI components	[X days/weeks]
Testing	Internal QA, client testing, refinements	[X days/week]
Delivery	Documentation, handover, go-live	[X days]

7.2 Key Milestones

MILESTONE	TARGET
Project Kickoff	[Date/Week X]
Development Complete	[Date/Week X]
Client Testing Begins	[Date/Week X]
Handover & Go-Live	[Date/Week X]

7.3 Dependencies

Timeline assumes:

- Timely client responses (within 48 hours)
- All access/credentials provided by kickoff
- No significant scope changes

Delays in client deliverables may impact timeline proportionally.

8. Investment

8.1 Project Fee

DESCRIPTION	AMOUNT
Workflow Development	[\$X,XXX]
Documentation & Training	Included
[X] Days Post-Launch Support	Included
Total Project Investment	[\$X,XXX]

8.2 Payment Schedule

PAYMENT	AMOUNT	DUE
Deposit (to begin work)	[\$X,XXX] (50%)	Upon agreement signing
Final Payment	[\$X,XXX] (50%)	Upon project completion

8.3 Payment Terms

- Invoices due Net [15/30]
- Accepted payment methods: [Bank Transfer / Credit Card / etc.]
- Late payments subject to [X]% monthly fee

9. Optional: Ongoing Maintenance

Maintenance Retainer (Optional)

TIER	MONTHLY FEE	INCLUDES
Basic	[\$XXX]/month	Monitoring, bug fixes, [X] hours support
Standard	[\$XXX]/month	Above + minor updates, monthly check-in
Premium	[\$XXX]/month	Above + priority support, [X] hours dev time

Retainer begins after project completion if selected.

10. Terms & Conditions

10.1 Change Requests

Changes to scope after signing will be documented and quoted separately. No out-of-scope work will be performed without written approval.

10.2 Intellectual Property

Upon full payment, Client owns all deliverables created specifically for this project. Provider retains rights to reusable templates, patterns, and generic components.

10.3 Confidentiality

Both parties agree to keep project details and any shared information confidential.

10.4 Limitation of Liability

Provider's liability is limited to the total fees paid for this project.

10.5 Termination

Either party may terminate with [14/30] days written notice. Client pays for all work completed to date.

11. Acceptance

By signing below, both parties agree to the terms outlined in this Scope of Work.

Client

Signature	** ** _
Name	** ** _
Title	** ** _
Date	** ** _

Provider

Signature	** ** _
Name	** ** _
Title	** ** _
Date	** ** _

Appendix A: Technical Requirements

[Add any specific technical details, API documentation links, or system requirements]

Appendix B: Sample Data Specifications

[Describe the format and type of sample data needed from client]

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