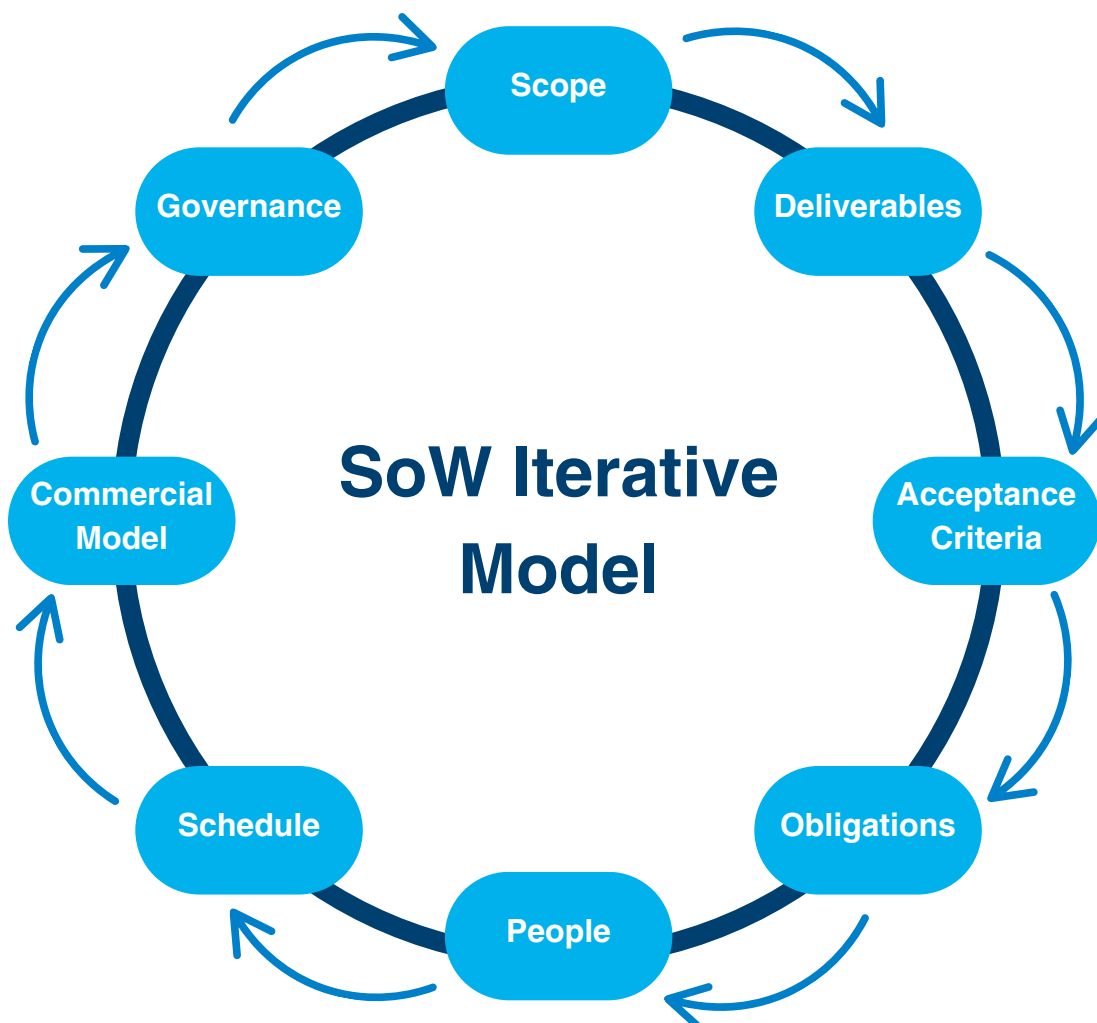# Statement of Work

SoW Toolkit

These tools are takeaways from our Statement of Work eLearning Program. Use them to help with your Statement of Work.

1 **Preparing Statements of Work Toolkit**

SoW Iterative Model

Statements of Work are an iterative process. Keep in mind that discussing one section informs another. Do not hesitate to revisit, improve, and clarify your work.

SoW Iterative Model

Scope · Deliverables · Acceptance Criteria · Obligations · People · Schedule · Commercial Model · Governance

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SoW Toolkit

8 Key SoW Questions

Statements of Work are an iterative process. Keep in mind that discussing one section informs another. Do not hesitate to revisit, improve, and clarify your work.

Question	Section
How will the provider help the client to achieve their outcomes?	*Scope*
What tangible things will the provider deliver to the client?	*Deliverables*
How will the client know what the provider delivered is good enough?	*Acceptance Criteria*
What will the provider need from the client?	*Dependencies*
When will the provider do the work?	*Schedule*
Who will work on the project?	*People*
How will the work be managed?	*Governance*
When will the client pay the provider?	*Commercial Model*

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Outcomes Bingo Card

Statements of Work are an iterative process. Keep in mind that discussing one section informs another. Do not hesitate to revisit, improve, and clarify your work.

Clarify the work	Change the scope	Add KPIs	Govern better
Add dispute resolution	Add content	Reduce the costs	Alter the people mix
Change the resource	Change the pricing model	Identify business value	Change the times
Protect against risk	Teach something	Reduce the costs	Allocate responsibility

2 Scope and Deliverables Toolkit

Killer Scope Questions

Asking these questions can streamline your process and bring clarity to your SoW.

1. What's the problem you're trying to solve?
2. Who wrote this?
3. How does it align with the company's strategy and strategic objectives?
4. What benefits will the project or service provide?
5. What outputs will the work achieve, and how do they link to the overall outcome?
6. Can we get a subject Matter Expert to review the scope?
7. How will we know the work has been successfully completed?
8. What's the scale of the unknowns? Should there be a paid Discovery Phase?

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Scope Checklist

Could you use this checklist during scope reviews? What's the problem you're trying to solve?

Identify and replace

- ☐ Jargon
- ☐ unclear writing
- ☐ Passive voice

Identify and add

- ☐ Lists
- ☐ Roles and responsibilities
- ☐ Duration
- ☐ An example in the appendices
- ☐ Methods that will be used

Deliverables Table

Add a deliverables table to your Statement of Work.

Deliverables	Description	Acceptance Criteria	Due Date	Deliverable Owner
[delname1]	[deldescr1]	[delac1]	[deldate1]	[ownername]
[delname1]	[deldescr1]	[delac1]	[deldate1]	[ownername]
[delname1]	[deldescr1]	[delac1]	[deldate1]	[ownername]

SoW Toolkit

3 Governance and Automation Toolkit

To understand the risks, ask the following:

To create a properly scaled governance structure, it's essential to comprehend potential challenges that may arise in your project. What's the problem you're trying to solve?

1. What are the ways this project could go wrong?
2. What is the likelihood of this project going wrong in those ways?
3. If the project goes wrong in those ways, how bad would that outcome be for the business?
4. What controls, such as meetings and reports, can you put in place to ensure the project is delivered successfully?
5. If the project is going wrong, when in the schedule would be a good time for the project team to intervene so they are still able to remedy the situation?
6. How can you ensure early visibility of things going wrong so that you can put measures in place to get back on track?

Obligations:

Assign clear and measurable responsibilities within the Obligation/Dependency table.

Party	Both parties agree to the following	Responsible person
[Provider Name]	[providerobligations1]	[name]
[Buyer Name]	[buyerobligation1]	[name]

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4 Governance and SoW Toolkit

Governance Table:

Incorporate a Governance Table into your Statement of Work to outline and agree upon the methods and schedule for reviewing the work.

Report or Meeting name	Report or Meeting Description	Frequency	Due Date	Audience / Attendees	Format / Location
[reportname 1]	[reportdescr1]	[reportfreq1]	[reportdue1]	[reportaud1]	[reportform1]
[meetingname1]	[meetingdes1]	meetingfreq1]	[meetdue1]	[meetattend1]	[meetloc1]

Replacement Deliverables Template:

We use this template text...

If the replacement deliverable does not, in **[buyername]'s** reasonable opinion materially conform to the acceptance criteria, **[buyername]** may reject the deliverable for a second time.

[buyername] may, at its option, either (i) return the deliverable and receive a refund of all fees paid for that deliverable, or (ii) require **[suppliername]** to correct the deliverable, without charge and in a timely manner (in which case acceptance of the deliverable shall not occur.

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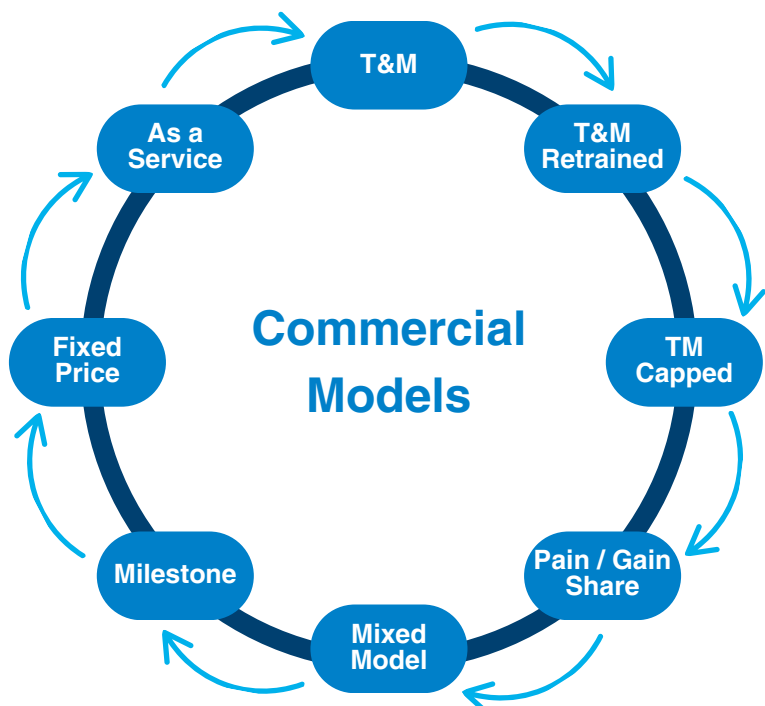### Acceptance Process Table:

We use this template text...

> **[buyername]** shall have five **[acceptanceperiod]** business days to review each deliverable against the relevant acceptance criteria ("Acceptance Period"). If **[buyername]** does not reject the deliverable within the acceptance period, the deliverable shall be deemed to be accepted. In the event that **[buyername]** rejects the deliverable, as in the Customer's reasonable opinion the deliverables do not materially conform with the acceptance criteria, both parties shall discuss the reason for rejection and, where reasonable, **[providername]** shall correct the rejected deliverable which shall then be subject to an additional acceptance period. **[buyername]** shall not unreasonably withhold acceptance of any deliverable and shall not unreasonably reject the deliverable.
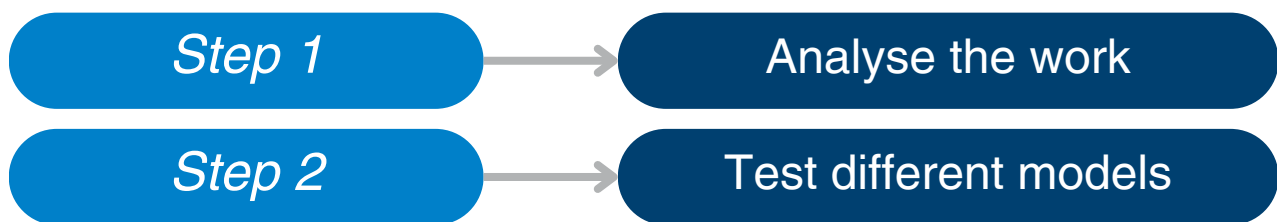
5 Commercial Strategy Toolkit

Commercial Models:

Be sure to explore and discuss the available options for the commercial model, making a deliberate choice that aligns with the nature of the work, the team involved, and the specific requirements of the project or service.

Commercial Models

- T&M
- T&M Retrained
- TM Capped
- Pain / Gain Share
- Mixed Model
- Milestone
- Fixed Price
- As a Service

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2 Steps to Choosing a Commercial Model:

| *Step 1* | → | Analyse the work |
| *Step 2* | → | Test different models |

People Schedule:

This tool enables open and transparent discussions between the business and the supplier regarding personnel structure and scheduling.

Start Date	End Date	Day	Name	Grade	Supplier Start Date	Linke dln	Role
1/1/24	1/1/25	366	Simon Day	Partner	12/12/2015	[Link}	Programme Lead
18/2/24	28/2/24	10	Carla Smith	Director	28/08/2022	[Link]	[meetloc1]

Querying People Schedule:

Use these questions to promote discussion around the People Schedule.

1. When do people start and end the project?
2. If everyone starts together, then what does everyone do on day one?
3. What is the balance of junior and senior staff on the project?
4. Who are the key personnel, and who's replaceable?
5. And why are they key?
6. Where are they based?
7. Will they be paid overtime?
8. Are they subcontractors?
9. Are they recent hires, and are we paying to train them?
10. Are they being treated correctly?
11. What holidays will they take?

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Querying Time Checklist:

Use these questions to think flexibly and enhance the schedules in your SoW.

- ☐ Tell us what factors influence when the work can start and end?

- ☐ What could happen if you started delivery earlier or later?

- ☐ What could be achieved if we doubled the size of the team?

- ☐ Does the work help or hinder other projects and their timeframes?

Learn more

Upskill with our self-paced four-part **Statement of Work eLearning Program** in partnership with Deployed. Try out our free **sample lesson**.