Statement of Work

|  |  |  |  |
| --- | --- | --- | --- |
| **Project** |  | | |
| **Vendor** |  | **Client** |  |
| **Vendor Project Manager** |  | **Client Sponsor** |  |
| **Agreement Date** |  | **Version** | 0.0.0 |
| **Project Begin Date** |  | **End Date** |  |

# Summary of Project

[Describe the primary goal of the project—what results are the client and vendor hoping to achieve?]

Client offers a wide range of products to business and consumer buyers. The project will deliver a comprehensive strategy to support buyers throughout the lifecycle with consistent, useful, compelling content available at point of need.

## Background

[Briefly describe what led to the decision to engage in the project, including meetings held to identify need, possible solution, specific objectives, possible risks, etc.]

Vendor has met with product, support, and IT stakeholders over a period of 10 months to determine why customer satisfaction numbers are falling, and support calls are rising. Client’s current support organization….

## Scope of Work

[Describe in detail what work the project entails. Consider including delivery methods into this description. The goal is to clearly define exactly what work will be done, so that the project team can avoid scope creep, and determine when additional work orders need to be submitted.]

Vendor will work with client to analyze and assess the current support content across all internal and customer-facing channels, detail workflows and process gaps and bottlenecks, and determine current tools inventory. Vendor will develop recommendations and a content strategy and execution plan to transform content development processes and deliver consistent content across all support channels.

## Objectives

[List the specific and measurable objectives of the project, and include a rationale as to why the objective is needed.]

|  |  |
| --- | --- |
| **Objective** | **Rationale** |
| 1. Assess current state online documentation and training library | Determine process and tool gaps, strength and weaknesses of legacy content, and technical needs. |
| 1. Analyze customer satisfaction data, and community forum structure and participation | Move client team to customer centric view of support functions and content, and understand customer demands and needs. |
| 1. Recommend a comprehensive content strategy and execution plan | Use analysis and assessment to design a strategy to move to a comprehensive “support center” approach. |
| 1. Implement a pilot program |  |
| 1. Analyze results of the pilot program |  |
|  |  |

# Tasks / Activities & Schedule

[Each objective should have one or more milestones & deliverables. The schedule should list them along with a Due Date to define the Period of Performance.

|  |  |  |  |
| --- | --- | --- | --- |
| **Task #** | **Task Description** | **Corresponding Deliverable** | **Due Date** |
| 1.1 | Perform content audit | Content Assessment Report | 02/01/20XX |
| 1.2 | Perform process analysis | Gap Analysis Report | 03/01/20XX |
| 1.3 | Perform Systems/tool review | Initial systems recommendations | 04/01/20XX |
| 2.1 | Create customer satisfaction benchmarks | Customer Satisfaction findings & recommendations | 05/01/20XX |
| 2.2 |  |  |  |
| 3.1 |  |  |  |
| 3.2 |  |  |  |
| 4.1 | Determine the channel and product scope of the pilot. | Pilot project brief. |  |
| 4.2 |  |  |  |

# Terms of Payment

## Cost Summary

[Describe the various costs expected to be incurred by the vendor, including personnel, implementation, training, storage, travel, etc.]

## Cost Breakdown

[Use the following chart to break out the estimated costs, delivery timeframes and payment terms.]

|  |  |  |  |
| --- | --- | --- | --- |
| **Rate Schedule** | | | |
| **Estimated Cost** | | **Delivery Schedule** | **Description** |
| $1,500 | | Prior to start of Phase 1 | Licenses and storage |
| $1,000 | | Conclusion of Phase 6 | Implementation training materials |
| (150 hours @ $75 per hr) $11,250 | | Net 30 monthly | Project manager |
| (250 hours @ $85 per hr) $21,250 | | Net 30 monthly | Content strategist |
| (300 hours @ $75 per hr) $22,500 | | Net 30 monthly | Implementation / Content engineering |
| $5,000 | | Net 30 upon submission | Travel |
| **$62,500** | |  | Total |
| **Payment Terms** | | | |
| **Completion Date** | **Payment Due** | | **Phase / Work Description** |
| 2/28/20xx | 3/28/20xx | | Phase 1: Project initiation |
| 3/28/20xx | 6/28/20xx | | Phase 2: Analysis |
| 6/28/20xx | 7/28/20xx | | Phase 3: Design/Build |
| 7/28/20xx | 8/28/20xx | | Phase 4: Testing |
| 8/28/20xx | 9/28/20xx | | Phase 5: Implementation |
| 10/15/20xx | 11/15/20xx | | Phase 6: Training/engagement |

# Project Requirements

[Use this section to identify specific roles and responsibilities between the Vendor and the Client that ensure successful completion. These requirements do not relate to any business, systems, or design requirements developed as deliverables within the project.]

## Vendor Responsibilities

[Call out the specific tasks, roles, materials, or resources for which the vendor has sole responsibility.]

Vendor has the following responsibilities to ensure timely completion of the project:

* Submit deliverables in accordance with agreed-upon schedule.
* Schedule and conduct regular status update meetings with the Client.
* Identify, escalate and share risks and issues with Client promptly.
* Use client-provided equipment and resources in accordance with Client policies and procedures.
* Submit invoicing and receipts in a timely fashion according to schedule.

## Client Responsibilities

[Call out the specific tasks, roles, materials, or resources for which the vendor has sole responsibility.]

Client has the following responsibilities to ensure timely completion of the project

* Review and decision acceptance of deliverables in accordance with agreed-upon schedule.
* Participate in regularly scheduled and ad hoc meetings with Vendor as agreed to support delivery, and as needed to address issues and risk mitigation.
* Provide equipment, including laptops, access badges, and network access as needed for Vendor personnel to complete the project.
* Review, approve and pay invoices in a timely fashion according to schedule.

## Mutual Responsibilities

*[Call out the specific tasks, roles, materials, or resources for which the vendor and the client share responsibility.]*

Vendor and Client share the following responsibilities for the duration of the project:

* Develop and follow communications protocols, including Points of Contact, to coordinate and follow up as needed.

# Project Risks

[During the discussions leading up to the SOW, the client and vendor should have mutually identified some risks that require mitigation planning. Note that additional risks may arise during the project, which may result in change orders or new SOWs.]

|  |  |
| --- | --- |
| **Project Risks** | |
| **Issue / Risk** | **Mitigation / Contingency** |
| Critical system downtime | Obtain IT operations maintenance and release schedules and plan tasks to accommodate scheduled downtime. |
|  |  |
|  |  |
|  |  |

# Standards and Compliance

[Depending on the type and complexity of the project, the vendor may have to develop plans for, and/or ensure compliance with various corporate standards, as well as regulatory issues.]

## Communications Plan

[Most projects should include a communications plan that describes how facets of the project will be communicated to stakeholders, the project team, and impacted users. Look for existing communications planning requirements from the client, and reference them here. If applicable, note that a communications plan is an identified deliverable.]

## Quality Management Plan

[Most projects include a quality management component that governs quality assurance and testing activities. Look for existing quality management requirements from the client, and reference them here. If applicable, note that a qualify management plan is an identified deliverable.]

## Training Plan

[If impacted users and other stakeholders require training to realize the benefits of the project, include a reference here, noting any client-provided standards or guidance, and whether this is a project deliverable.]

## Standard Compliance

[The client may have specific standards around project management and/or the deliverables of the project. They should be noted here.]

## Regulatory Compliance

[Identify any local, state, or federal regulations that impact the project delivery, and summarize how the project will address the requirements (i.e., through development and adherence to risk mitigation plans, timely submission for regulatory approval, etc.).]

## Privacy & Security Adherence

[Summarize the privacy requirements that the project will be impacted by, or have impact upon, including protection of personally identifiable data, confidential and proprietary information, or government secrecy classifications.]

# Business Terms / Conditions

## Contract Modifications

[Summarize the actions the vendor and client must take to modify the SOW / contract, such as formal change order processes.]

## Confidentiality

[Summarize vendor and client responsibilities with regard to confidentiality, and reference accompanying non-disclosure agreements.]

## Termination

[Describe under what conditions the SOW / contract may terminated by either the vendor or client, and how termination would occur.]

# Comments and Approval

[Describe who will have the authority to approve deliverables, changes or new work orders. Include any additional information on the project manager, and the client’s assigned point of contact.]

# Authorization

|  |  |  |
| --- | --- | --- |
| **Authorization** | | |
| **Client** | **Signature** |  |
| **Printed Name** |  |
| **Title** |  |
| **Date** |  |
| **Vendor** | **Signature** |  |
| **Printed Name** |  |
| **Title** |  |
| **Date** |  |