

Statement of Work

[Project name] for [Client legal name]

SOW [reference], issued under the [Consulting Agreement] dated [date]

CLIENT

[Client legal name], [registered address], [company number]

CLIENT SPONSOR

[Name], [title], [email]

PROJECT PERIOD

[Start date] to [end date]

CONSULTANT

[Consultancy legal name], [registered address], [company number]

ENGAGEMENT LEAD

[Name], [title], [email]

VERSION

[v1.0], [date]

How to use this template

Replace every [bracketed] field, delete the rows and options you do not need, and keep the section numbers so change requests can refer to them. This template is a starting point, not legal advice: have it reviewed by a lawyer in your jurisdiction before you sign it.

01 Purpose and precedence

This Statement of Work (SOW) describes the services, deliverables, schedule and fees for [Project name]. It is issued under the [Consulting Agreement] dated [date] between the parties (the Agreement), whose terms apply to it. If this SOW and the Agreement conflict, the Agreement prevails unless this SOW names the clause it changes.

02 Objectives and success measures

Background

[Two or three sentences on the Client's situation, in the Client's own words.]

Objective

[The business result the Client wants, e.g. approved list prices for the 2027 range.]

Success measures

[How both parties will know it worked, e.g. the steering committee approves the pricing model by 30 November.]

03 Scope of work

In scope

- [Activity, e.g. interviews with up to 8 sales and finance managers]
- [Activity, e.g. analysis of 24 months of transaction data provided by the Client]
- [Activity, e.g. two workshops with the steering committee]

Out of scope (not included in the fees)

- [Exclusion, e.g. implementing the new prices in the ERP system]
- [Exclusion, e.g. countries or business units not named above]
- [Exclusion, e.g. training sales teams]

Anything not listed as in scope is out of scope and needs an approved change request (section 09).

04 Deliverables and acceptance criteria

ID	Deliverable and format	Acceptance criteria	Due
D1	[Current-state assessment] [PDF report, up to 20 pages]	[Covers the 3 business units in scope; findings reviewed with the sponsor in a 60-minute session]	[date]
D2	[Pricing model] [Excel workbook and method note]	[Reproduces last year's actual revenue within 2%; the Client's finance lead can update every input]	[date]
D3	[Recommendations] [Slide deck, 15 to 25 slides]	[Presented to the steering committee; each option has a cost and a revenue estimate]	[date]
D4	[Deliverable] [Format]	[Criteria a person outside the project could check]	[date]

Write each criterion so that someone who did not do the work could check it.

05 Milestones and payment

ID	Milestone	Deadline	Deliverables	Payment
M1	[SOW signed and kick-off held]	[date]	None	[20]% of fees
M2	[Current-state assessment accepted]	[date]	D1	[30]% of fees
M3	[Pricing model accepted]	[date]	D2	[30]% of fees
M4	[Final recommendations accepted]	[date]	D3, D4	[20]% of fees

Total fees [Amount and currency], excluding VAT

Fee type [Fixed fee] or [time and materials at hourly rate, capped at amount]

Invoicing Each milestone is invoiced when its deliverables are accepted

Payment term [30] days from receipt of the invoice

Expenses [Not included] or [reimbursed at cost when approved in writing in advance]

06 Client responsibilities and dependencies

The Client will:

- Name a sponsor with authority to accept deliverables: [name].
- Provide [data, documents and system access] by [date].
- Make [roles] available for up to [8] interviews of [60] minutes.
- Answer questions and review drafts within [3] business days.

If a dependency is late, every date that depends on it moves by the same number of days. A delay of more than [10] business days is handled as a change request.

07 Assumptions and constraints

- [Assumption, e.g. transaction data can be exported from one system in one format.]
- [Assumption, e.g. the work is remote, with up to 2 days on site.]
- [Constraint, e.g. workshops are held in English at the Client's offices in city.]

If an assumption proves wrong, either party may raise a change request.

08 Acceptance procedure

1. The Consultant submits each deliverable with a note listing its acceptance criteria.
2. Within [10] business days, the Client accepts it in writing or lists the criteria it does not meet, with reasons.
3. The Consultant corrects those points and resubmits within [5] business days; the Client then reviews only the corrected points.
4. A deliverable is accepted when the Client confirms it, uses it in its business, or does not reply within the review period.

09 Change control

Either party may request a change in writing. Within [5] business days the Consultant replies with its impact on scope, dates and fees. Work on a change starts only after both parties approve it in writing; approved changes become part of this SOW.

Change request [CR-01], requested by [name] on [date]

Description [What changes and why]

Impact Scope: [what changes] | Dates: [new dates] | Fees: [amount]

Approved by Client: [name, date] | Consultant: [name, date]

10 Governance and reporting

- Status update every [Friday] by [email or client portal]: progress, next steps, risks and decisions needed.
- Steering committee every [4] weeks: [names and roles].
- Shared workspace: [tool], where the Client can see the milestones, tasks and documents of this SOW.
- Escalation: [engagement lead] and [client sponsor], then [partner] and [executive].

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Key people

Role	Name	Responsibility
Engagement lead	[Name]	[Day-to-day delivery and reporting]
Consultant	[Name]	[Analysis and workshops]
Client sponsor	[Name]	[Decisions and acceptance]
Client project contact	[Name]	[Data, access and scheduling]

Named people are replaced only with the other party’s agreement, which is not unreasonably withheld.

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Signatures

For [Client legal name]	For [Consultancy legal name]
Name _____	Name _____
Title _____	Title _____
Signature _____	Signature _____
Date _____	Date _____

A

Annex: change log

Record every signed version and approved change request, so both parties can see what the SOW says today and how it got there.

Version	Date	What changed	Approved by
[v1.0]	[date]	Original SOW signed	[Client name], [Consultant name]
[v1.1]	[date]	[CR-01: description, impact on dates and fees]	[Client name], [Consultant name]
[v1.2]	[date]	[CR-02: description, impact on dates and fees]	[Client name], [Consultant name]