



Project Statement of Work

Complete one SOW for each project. It defines what S&J Consulting will deliver, how the client will evaluate it, and the agreed project cost. This template covers both organizational and technical engagements.

DRAFT FOR LEGAL REVIEW. Complete every bracketed field and obtain appropriate legal review before signing. Proposed default terms are negotiable; this template is not a signed agreement.

SOW number and version: [ID and version] Date: [date]

Client legal name: [name] Project title: [title]

Master agreement effective date: [date]

Client sponsor and approver: [name, role, email]

S&J project lead: [Shelle Wood, Jody Wood, or both]

1 Business objective

[Describe the problem, its business impact, desired outcome, and reason for acting now. State measurable success targets without promising results outside the project's control.]

2 Scope and boundaries

Included work: [activities, departments, processes, systems, databases, sites, and reporting periods]. Excluded work: [items not included, such as ERP upgrades, ongoing support, cybersecurity audits, or unrelated integrations].

3 Deliverables and acceptance

ID and deliverable	Acceptance evidence	Client reviewer
D1 [deliverable]	[objective test or review standard]	[name]
D2 [deliverable]	[objective test or review standard]	[name]
D3 [deliverable]	[objective test or review standard]	[name]

Select only applicable deliverables: written strategic plan; organizational assessment; process map; operating procedure; dashboard and metric dictionary; automation scripts and runbook; integration specification; system configuration plan; training materials; implementation and rollback plan.

4 Assumptions and dependencies

[Document source-data quality, system availability, licenses, access, client participation, dependencies, and exclusions. Identify how unmet assumptions affect scope or schedule.]

5 Schedule and responsibilities

Phase	Target dates	Owner and exit condition
Discover	[dates]	[owner; assessment approved]
Design and align	[dates]	[owner; design approved]
Implement and validate	[dates]	[owner; tests completed]
Handoff and close	[dates]	[owner; acceptance and training]

6 Delivery and onsite arrangements

Remote work is the default unless agreed otherwise. Onsite work is optional and arranged when beneficial. Site and dates: [details]. Onsite purpose and activities: [details]. Client access, workspace, safety, and participation: [requirements]. Travel cost treatment and advance approval: [included amount, reimbursable limits, or not applicable].

7 Technical and data requirements

[If applicable, identify SQL instances and databases, application owners, credentials process, AD groups, read/write permissions, hosting, refresh frequency, source-data latency, validation, backup, production approval, rollback, and incident contacts. State excluded sensitive data and any separate data-processing terms.]

8 Communication and change control

Status meetings: [cadence]. Reports and decision log: [location]. Authorized change approvers: [names]. Scope changes use a signed change request stating added work, schedule impact, cost, and revised acceptance criteria. No changed work begins before authorization.

9 Acceptance and support

Client reviews each submission within [number] business days and accepts it or documents material gaps against the criteria in section 3. Correction and resubmission process: [details]. Warranty correction period consistent with the agreement: [period]. Included post-delivery assistance: [hours, period, and boundaries]. Ongoing support and enhancements: [separate SOW or agreed terms].

10 Project fees and payment

Pricing basis: [fixed fee / time and materials / capped time and materials]

Total fixed fee or authorized cap: \$[amount]

Hourly rates if applicable: [role and rate]

Invoice terms: [due date or number of days]

Taxes and approved expenses: [treatment]

Payment milestone	Amount	Invoice trigger
[deposit or first milestone]	[\$amount]	[signed SOW / date]
[second milestone]	[\$amount]	[specific completion event]
[final milestone]	[\$amount]	[acceptance event]

Confirm milestone amounts total the agreed fixed fee. For time and materials, specify estimates, time reporting, and approval before exceeding a cap. Identify whether fees include travel and third-party subscriptions. No public website price establishes this project's fees.

11 Ownership and handoff

Client-specific deliverables assigned after payment: [list]. Retained Consultant tools or materials: [list]. Third-party components and licenses: [list]. Source code, editable files, documentation, and access handoff: [list and location]. Any express amendment to the master agreement: [section and approved replacement, or none].

12 Authorization

The parties approve this SOW under the identified master agreement. Work begins on [date or condition] after [signature and any deposit or access prerequisites].

For S&J Consulting, LLC

Authorized signer: [name and title] Signature: _____ Date: _____

For Client [legal name]

Authorized signer: [name and title] Signature: _____ Date: _____