STATEMENT OF WORK (SOW) CHECKLIST

This checklist describes how to create your project Statement of Work (SOW) document and ensure that you provide sufficient detail to gain the agreement of all the necessary parties to the scope of work your project requires. Your SOW needs to provide detailed descriptions of the work, such as:

- Detailed requirements of work.
- Duration of each work package.
- Provide a precise description of each deliverables.
- Define what is agreed as 'acceptable' output for each work package

This document is often sent out to potential suppliers when aspects of the project are being outsourced along with a Request for Proposal (RFP) so that accurate and comprehensive responses to the RFP are received by your organization.

The appropriate parties, stakeholders or sponsor of your project must sign your SOW before it can become a formally accepted project document.

INTRODUCTION

As this document is frequently used both internally and externally your SOW document needs an introduction to ensure that anyone reading it has a full appreciation and understanding of your project. The description and data supporting your introduction must paint a clear picture of the project:

- Background
- Benefits it offers
- Business need it satisfies
- How it contributes to your organization's strategy (The degree to which this can be explained will vary according to the level of confidentiality or competitive advantage your project involves.)

This section of your SOW enables any recipient of this document to have a full appreciation of the level of importance this project has for your organization.

SCOPE OF WORK

In this section you describe what your objective is and what you want to accomplish from the work you detail here that is the 'scope of work'. It needs to provide details of exactly what the following are:

- Project deliverables
- Work tasks (as defined in 'Work Requirements' section.)
- Scope of Project (including assumptions, constraints and exclusions).

PERIOD OF PERFORMANCE

This section outlines the precise timeframe for your project. The end date of your project must be communicated to everyone involved in the project and may be set by legislation, regulatory standards or have been pre-determined by its significance in your organizations growth strategy.

PERIOD OF PERFORMANCE CONTINUED:

This date will have implications in terms of project costs and contractual terms. Any contract you take out with a third party as part of your project needs to ensure the issue of delays, or under-performance is properly addressed. This may require penalties for missed deadlines to be imposed on suppliers.

PLACE OF PERFORMANCE

This section informs the person or organization you will be performing the work where they will be located whilst they undertake this task or work package. For your project there may be instances where a contractor must conduct the work at your offices and at other times it may need to be carried out remotely.

You must also ensure that you detail in this section any specific equipment, workspace or work practices that you require adherence to when performing the work.

Different industries often have their own practices and you will need to familiarize yourself with what your organization's usual practice is.

WORK REQUIREMENTS

An essential aspect of the SOW is the detailed description of the tasks that need to be performed in order to achieve the project, which are outlined in the work requirements section. This contains as detailed as possible description of the work tasks and /or work packages that make up the project. Each of these items needs to be completed in a timely fashion for the project to be successfully completes on time.

SCHEDULE MILESTONES

This section describes and outlines the agreed schedule of project deliverables and all the project milestones. It is important that these details are as accurate as possible so that any third party responding to an RFP is as informed as possible.

ACCEPTANCE CRITERIA

For a project to be completed it is essential that a definition of what is acceptable is agreed at the outset of any project. The exact criteria of what your 'end user' or 'customer' will accept for each deliverable must defined here and once this document is signed by the correct parties this becomes the project output. A full description ensure that both parties, the 'supplier' and the 'customer', know exactly what is:

- Meant by 'acceptable' work
- Know the acceptance process
- Know which individual has the authority to accept each item of work

OTHER REQUIREMENTS

With many projects there are certain aspects that do not fit into any other section but are an essential part of ensuring your project is successful. This often includes such aspects as security clearance for personnel both at locations and for use of certain IT systems and databases. You will also need to detail when essential maintenance and system downtime will occur throughout the project so that its impact can be accounted for.