



Statement of Work Checklist

OBJECTIVE

A 100% perfect Statement of Work (SOW) does not exist. The real objective is to create an **effective** SOW.

WHAT IS AN EFFECTIVE SOW?

An effective SOW gives Expert Suppliers information needed to prepare an accurate proposal response. This checklist provides a list of minimum elements to consider when developing an Effective SOW.

How Does your SOW Stack-up?

SCOPE SUMMARY

- ✓ Project Overview: clear, concise, & easily understandable (1-2 paragraphs max)
- ✓ Goals, Objectives & Motivation: primary business drivers and purpose
- ✓ Key Measures of Success: top 3-5 quantifiable metrics (cost, time, quality)

CURRENT CONDITIONS

- ✓ Overview: clear, concise, & easily understandable description of current state
- ✓ Figures, Diagrams, & References: supporting docs to describe current state
- ✓ Pain Points: biggest dislikes, problems, challenges that must be fixed
- ✓ Strengths: aspects that should remain or be built upon
- ✓ Volumes/Quantities: describe the level of current operations
- ✓ Other: other miscellaneous information to paint the picture of current state

DETAILED REQUIREMENTS

- ✓ Overview: clear, concise, & easily understandable description of future state
- ✓ Figures, Diagrams, & References: supporting docs to describe future state
- ✓ Transition/Migration: efforts to move from current state info into future state

DETAILED REQUIREMENTS

- ✓ List of Requirements: itemized, organized, categorized
- ✓ Project Deliverables: tangible outcomes to be produced by the supplier
- ✓ Minimum Qualifications: pass/fail elements

SCHEDULE REQUIREMENTS

- ✓ Schedule Constraints: clear and transparent identification of timing needs

BUDGET REQUIREMENTS

- ✓ Budget Constraints: clear and transparent identification of financial needs

UNIQUE CONSIDERATIONS

- ✓ What may be unusual in your environment (vs. the supplier's other clients)?
- ✓ Unknowns & Assumptions: list any conditions that are unknown or assumed

QUESTIONS? Contact Jeff Sawyer at jeff@simplar.com