

# SAMPLE PROJECT SCOPE

Want to set the ultimate expectations on what will and will not be done during your project? Write a project scope (also commonly referred to as a contract or statement of work).

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The example below isn't meant for you to pick up and use—in fact, we warn against that. The best scopes—particularly when they outline costs, payments, and related terms—are always reviewed by lawyers. So, while you can use this doc as a starting point, **we strongly recommend that you have a lawyer review any scope document before putting it in front of anyone for a signature.**

You'll note that this is a real example—albeit a short one—with notes to call out why certain content is important. But remember: It's just a sample! There are other ways of doing this, and more content and legalese that could (and likely should) be included. While we do not want you to copy and paste this file, we want it to help you understand how scopes are written and what they should communicate.

Statement of Work:  
Process and Workflow Assessment

Prepared for: Project Owner Name at Client Business  
By: Project Lead Name at MyCompany  
April 19, 2019

**NOTE:** Be sure to include the project name or title, along with project owners and a document date, either on a separate cover page or at the top of your document.

This Statement of Work is entered into as of April 28, 2019, by and between: MyCompany, a business residing at 1234 Street Lane, Anytown, NY 10008 (“MyCompany”); and Client Business, a business residing at 1324 Lane Street, Anytown, CA 90210 (“Client”)

**NOTE:** It may seem silly to spell these things out, but in some cases, a scope will also serve as a legally binding document. So be sure you have all the details, including the work start date and the parties involved—along with their addresses—outlined here.

In consideration of the parties’ mutual rights and obligations set forth herein and other good and valuable consideration the receipt and sufficiency of which are hereby acknowledged, the parties, intending to be legally bound, hereby agree as follows:

## **1. SERVICES**

1.1 The Services. MyCompany will conduct a process and workflow assessment and deliver a recommendations report upon completion of research.

The following services (the “Services”) will be conducted remotely for Client:

- A 2-hour kickoff meeting to plan onsite visit, interviews, and next steps
- Review of current process documentation
- Review of project tools and workflows
- Up to twelve (12) 30-60-minute in-person and remote interviews with key Client team members and clients to discuss current PM practices, pain points, aspirations, and goals
- Up to four (4) 30-60-minute remote phone calls with Client’s clients to discuss their experiences working with Client
- A final recommendations document that will outline findings based on the reviews, interviews, and workshop conducted. Recommendations will include short- and long-term changes to Client’s process, as well as next steps for potential projects or trainings between MyCompany and Client.
- Up to two (2) additional calls will be offered to review and discuss the findings and recommendations document.
- MyCompany will not take on any project management responsibilities during this project.

- MyCompany will not be doing any one-on-one coaching session with Client team members during this project.

**NOTE:** This is where the actual definition of your project scope comes in. Be sure to outline all the activities you will conduct—and be specific about quantities because that’s often where confusion comes in. Also, clearly state things that will not be part of your scope here. This will squash any confusion or attempts to squeeze in more work.

## **2. COMPENSATION**

2.1 The total cost of the project is \$10,000

Client shall pay MyCompany for the Services on a fixed-fee basis in two (2) payments:

- Project Reservation (due upon signing): \$5,000
- Delivery of Recommendations: \$5,000

**NOTE:** This may be the easy part to write, but it can be the most difficult part to agree on for many companies. You’ll want to confirm your project cost before sending it in a formal doc. And while you’re at it, talk about project timing as it relates to invoicing. That will help you avoid back and forth about what’s acceptable, or even possible, with some companies.

2.2 Invoices. MyCompany shall submit invoices to Client upon execution of this contract and upon delivery of Recommendations for the Services furnished hereunder. Invoices shall be payable within thirty (30) days of the date of invoice.

**NOTE:** Payment of invoices can get difficult, especially when working with large organizations. Be sure that you understand that company’s policies around payment and the amount of time it should take. This will save you time later on when you’re chasing a paycheck.

2.3 Taxes. MyCompany shall be responsible to pay any taxes, excises, and other governmental charges (except taxes on or measured by the net income of Client) in connection with MyCompany’s Services pursuant to this Agreement.

**NOTE: DO NOT just copy/paste this section.** Be sure it’s reviewed by a lawyer. After all, you don’t want to make mistakes when it comes to taxes.

## **3. TERM**

3.1 This Agreement is effective as of the date set forth above. Work will start no later than April 28, 2019, dependent on project reservation payment, and shall continue until Recommendations are delivered.

3.2 Client must give 10 days’ notice prior to completion to notify MyCompany if the contract will be canceled or renewed.

**NOTE:** Be sure to outline your start and end dates. As you can see here, the end date is based on a deliverable. That allows some wiggle room in timing. If your project has a hard deadline, use that date.

**4. TERMINATION**

4.1 Rights upon Termination. Upon termination of this Agreement for any reason, MyCompany will not be entitled to any further payments under the Agreement other than for Services rendered up to the effective date of termination. Termination shall be without prejudice to any rights or remedies MyCompany or Client may have by reason of any breach of this Agreement.

**NOTE: DO NOT just copy/paste this section.** Be sure it's reviewed by a lawyer. You don't want to end up in an awkward situation if your project is terminated and you're not clear on what you're owed.

IN WITNESS WHEREOF, the parties, intending to be legally bound, have caused this Agreement to be executed the day and year first above written.

MyCompany

Client

\_\_\_\_\_  
Signer Name, date

\_\_\_\_\_  
Signer Name, date

**NOTE:** Finally, get a signature on your scope to be sure there's 100% agreement. This is paramount for setting and managing expectations. You'll want to use this scope not only to track your work against it, but also to help defend your timeline and budget from new requests once the project's underway.