



# Scope of Work Template

A clean SOW template that reduces ambiguity - deliverables, milestones, assumptions, acceptance criteria, and what happens when priorities change.

## Downloads

- Open template page
- Copy the Doc template (placeholder link)
- PDF copy (this file)

## What you will get

- **Plain-English SOW** you can send to clients without legalese
- **Formal SOW** version with common clause structure and placeholders
- **Out-of-scope** examples that prevent scope creep
- A clear **change request** connection so changes do not derail delivery

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# How to use this template

Use this SOW to align on deliverables, timeline, and what "done" means. The goal is to make the next steps obvious and reduce back-and-forth later.

## Quick workflow

- Start with the **Creative Brief** (or intake notes) so goals and constraints are clear.
- Fill the **Deliverables** table with specific outputs (not vague activities).
- Define **acceptance criteria** for each deliverable (what you will review against).
- List **assumptions** (inputs you need from the client, access, approvals).
- Write an explicit **out-of-scope** list to protect the timeline.
- If something changes, route it through a **Change Request** (options + impact + approval).

### Keep it specific

Avoid placeholders like "design support" or "website updates". Instead: "Homepage redesign (desktop + mobile)" or "Set up 3 email templates".

## What to send the client

Send the Plain-English SOW when you want speed and clarity. Use the Formal SOW when your client prefers a more clause-based structure.

# Plain-English Scope of Work

Copy/paste this section into a Doc and replace the bracketed placeholders. Keep it to 1-3 pages for most projects.

<b>Project</b>	[Project name]
<b>Client</b>	[Client name]
<b>Provider</b>	Corcava / [Your company name]
<b>Effective date</b>	[YYYY-MM-DD]
<b>Version</b>	v1.0

## 1) Project summary

[1-2 sentences describing the outcome the client is paying for and the context. Example: Redesign the marketing site homepage to improve demo requests and clarify positioning.]

## 2) Scope and deliverables

Use the table below. Keep deliverables measurable and reviewable.

Deliverable	Description	Owner	Target date	Acceptance criteria
[D1]	[What it is, and what it includes]	[You/Client]	[YYYY-MM-DD]	[How you will confirm it's done]
[D2]	[...]	[...]	[...]	[...]
[D3]	[...]	[...]	[...]	[...]

## 3) Timeline and milestones

Milestone	Date	Notes
Kickoff	[YYYY-MM-DD]	[Access, stakeholders, success criteria confirmed]
Milestone 1	[YYYY-MM-DD]	[...]
Review window	[YYYY-MM-DD]	[Client provides feedback within X business days]
Final delivery	[YYYY-MM-DD]	[...]

## 4) Communication and approvals

- **Primary contacts:** [Name, role] (Client) and [Name, role] (Provider)

- **Status updates:** [e.g., weekly on Tuesdays] via [email / client portal / chat]
- **Review windows:** Client feedback due within [X] business days of each review request
- **Approvals:** [Who approves deliverables and change requests]

## 5) Assumptions

- Client will provide required access (accounts, brand assets, stakeholders) by [date].
- Feedback will be consolidated and delivered in one place (not scattered across channels).
- Delays in approvals can shift the timeline.

## 6) Out of scope

List what is not included so the timeline stays predictable.

Not included (examples)	If requested, handle as
Additional pages or layouts not listed in Deliverables	Change request (cost/time impact)
New messaging/positioning work beyond the brief	New scope (option A/B)
Extra revision rounds beyond [X] rounds per deliverable	Change request or retainer usage

## 7) Acceptance and sign-off

By signing, both parties agree to the scope, timeline, and change request process described above.

Client	Provider
Name: _____	Name: _____
Signature: _____	Signature: _____
Date: _____	Date: _____

# Formal Scope of Work

Use this version when you need a more clause-based structure. Replace placeholders and remove any sections that do not apply.

## 1. Parties

This Scope of Work ("SOW") is entered into between **[Client legal name]** ("Client") and **[Provider legal name]** ("Provider").

## 2. Project

Provider will perform the services described in this SOW for **[Project name]** (the "Project").

## 3. Services and Deliverables

Provider will deliver the items listed in **Exhibit A** (Deliverables) in accordance with the timeline in **Exhibit B** (Milestones).

## 4. Client Responsibilities

Client will provide timely access, materials, and approvals as required for Provider to perform the services. Client delays may impact the schedule.

## 5. Review and Acceptance

Deliverables will be deemed accepted when (a) Client provides written approval, or (b) [X] business days pass without rejection with specific reasons.

## 6. Fees and Payment

Fees: **[fee amount and structure]**. Payment schedule: **[terms]**. Late payments may pause work.

## 7. Change Control

Any changes to scope, deliverables, or timeline must be documented and approved via a Change Request. Work on changes begins after approval.

## 8. Confidentiality

Each party will keep the other party's confidential information confidential and use it only to perform under this SOW.

## 9. Intellectual Property

Unless otherwise agreed in writing, ownership and licensing of deliverables will be: **[describe]**.

## 10. Term and Termination

This SOW begins on **[start date]** and ends upon delivery and acceptance, unless terminated earlier. Either party may terminate with **[notice period]**.

## Exhibit A - Deliverables

Copy the deliverables table from the Plain-English SOW and keep it consistent.

Deliverable	Description	Owner	Target date	Acceptance criteria
[D1]	[What it is, and what it includes]	[You/Client]	[YYYY-MM-DD]	[How you will confirm it's done]
[D2]	[...]	[...]	[...]	[...]
[D3]	[...]	[...]	[...]	[...]

## Exhibit B - Milestones

Milestone	Date	Notes
Kickoff	[YYYY-MM-DD]	[Access, stakeholders, success criteria confirmed]
Milestone 1	[YYYY-MM-DD]	[...]
Review window	[YYYY-MM-DD]	[Client provides feedback within X business days]
Final delivery	[YYYY-MM-DD]	[...]

## Out of scope and change requests

Most projects go sideways when changes arrive informally. The easiest fix is to define what is out of scope and use options when priorities change.

Request	Why it changes scope	Option A	Option B
"Can we add 2 more pages?"	New deliverables and review time	Add pages (timeline + cost)	Swap: remove another deliverable
"Can you write the copy too?"	New workstream and approvals	Add copywriting package	Client provides copy by a date
"One more round of revisions"	More cycles and stakeholder time	Add revision round fee	Reduce scope elsewhere

### Change request link

Use the change request template to document impact and approvals:

<https://corcava.com/templates/client-ops/change-request-form-template>.

### Copy/paste message to introduce a change request

Hi [Name] – happy to take this on.

To keep the timeline predictable, can you confirm this as a change request?

- Request: [summary]
- Impact: [time/cost/timeline]
- Options: (A) [option A] (B) [option B]
- Approval: Reply with "Approved - Option A" or "Approved - Option B"

Once approved, I'll update the plan and proceed.

## Related templates

- Change Request Form Template
- Creative Brief Template
- Project Kickoff Checklist
- Retainer Tracker Template
- Billable Utilization Calculator