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## Template Guide

### **What is a Statement of Work?**

A Statement of Work (SOW) is a document that defines the procurement requirements of the project in sufficient detail to enable potential suppliers to determine if they are able to meet those requirements. The following list provides examples of types of requirements a project may have for potential suppliers and their products:

- Company (size, industry)
- Product (type, number of years available)
- Training (level required)
- Documentation (provided with product)
- Support (available for product).

The SOW also outlines the expectations of the supplier in terms of the:

- Materials and Equipment (to be provided)
- Deliverables Schedule (and process for acceptance)
- Payments (of invoices)
- Confidentiality (of sensitive information).

### **When to use a Statement of Work**

An SOW should be used whenever a formal Tender Management Process is undertaken (i.e. whenever a product is required from outside the project and a preferred supplier has not yet been chosen). It is critical to the tender process to clearly outline, in simple terms, the procurement requirements within the SOW. If this is not achieved, it is less likely that the actual procurement requirements of the project will be fully satisfied, thereby placing the project at risk.

The SOW is the first document created as part of the Tender Management Process. It forms the basis upon which the tender documents (RFI, RFP) are formed and is the core document against which supplier responses are evaluated. The SOW is, typically, written by the Procurement Manager and approved by the Project Manager. It is released to suppliers along with the tender documentation and updated throughout the Tender Management Process.

### **How to use this template**

This document provides a guide on the topics usually included in a Statement of Work. Sections may be added, removed or redefined at your leisure to meet your particular business circumstance. Example tables, diagrams and charts have been added (where suitable) to provide further guidance on how to complete each relevant section.

## 1 Introduction

[Provide a brief summary of the project by describing the objectives, scope, deliverables and milestones. List the generic types of product to be sourced from outside the project and the reasons why.]

## 2 Requirements

[Provide the supplier with a detailed listing of the procurement requirements of the project. This includes a description of the requirements of the Supplier Company, product, training offered, documentation issued and support provided.]

### 2.1 Company

[List the requirements of the supplier company and the reasons why these requirements are important to the project by completing the following table (includes examples):]

Requirement	Reason
Supplier must have a minimum of 5 years trading in the relevant market segment.	It is important that the supplier organization is well established in the market place and is not likely to cease trading during the life of this project.
Supplier must operate in the computer sales market within the USA.	The supplier must currently be delivering product within a relevant local market segment to provide confidence that s/he can deliver the required product.
Supplier must have provided similar product to at least 3 similar customers who are able to act as reference sites within the last 2 years.	Proven delivery to other similar customers is critical to ensuring that the supplier has a valid supply chain.
[Add Item]...	[Add Item]...
[Add Item]...	[Add Item]...