Developing an Effective Scope of Work

Creating an effective scope of work (SOW) document is critical for project success, but many organizations fail to develop SOWs or ensure they contain the needed information. Consequently, project owners face increased project risk in terms of project cost, duration, and quality. This article identifies methods to improve the SOW and, by extension, the vendor-selection process, which leads to improved project results, owner satisfaction, and owner-vendor relations.

Draft the SOW

The first step in developing an SOW is to think from the *perspective of vendors*. What information do they need to know about the project in order to determine a realistic and efficient price? What information do they need in order to minimize contingencies? Further, what information–or lack thereof–will discourage vendors from submitting a project proposal?

A SOW should have the following components:

1. High-level overview of the project: In a few sentences, explain the purpose of the project.
2. Project/service goals and expectations: Identify the desired outcomes regarding the project. Describe the tasks that must be completed in order to achieve 100% satisfaction at the completion of the project.
3. Detailed description of deliverables
4. Budget: Identify the project budget and whether it is flexible. Provide as much information as possible regarding the budget/estimate.
5. Schedule: Identify any time constraints for completing the project (e.g., hours of operation and completion date).
6. Project/services details and requirements: Identify all the requirements that must be met in order to achieve high satisfaction. Explain the minimum requirements (for the project and the vendor) that must be completed to achieve goals and satisfy expectations. Provide all specifications, standards, and plans.
7. Existing conditions/current environment: Provide as much information as possible about the current environment, including background information about the project and the user; the greatest issues and obstacles previously experienced with the project; and, if applicable, how long the service has been in place, the number of years with the current provider, performance documentation, financial data, current constraints, overall satisfaction regarding the project, and what could have resulted in higher satisfaction.
8. Project risks and concerns: Identify any unique information about the project that might affect the project cost, project duration, or other aspects of the project.

Conclusion

When project owners ensure SOWs contain the right information and avoid unneeded and prescriptive information, not only are vendors more likely to submit project proposals but the proprosals are more likely to be accurate, contain fewer contingencies, and offer more value-added options. Overall, an effective SOW decreases project risk for the owner, including in terms of cost and duration, and can improve project quality.

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