

Developing Your Scope Of Work



Recap

...Supplier
Perceptions
Matter!



What Type Of Suppliers Do You Want To Attract?

Supplier A



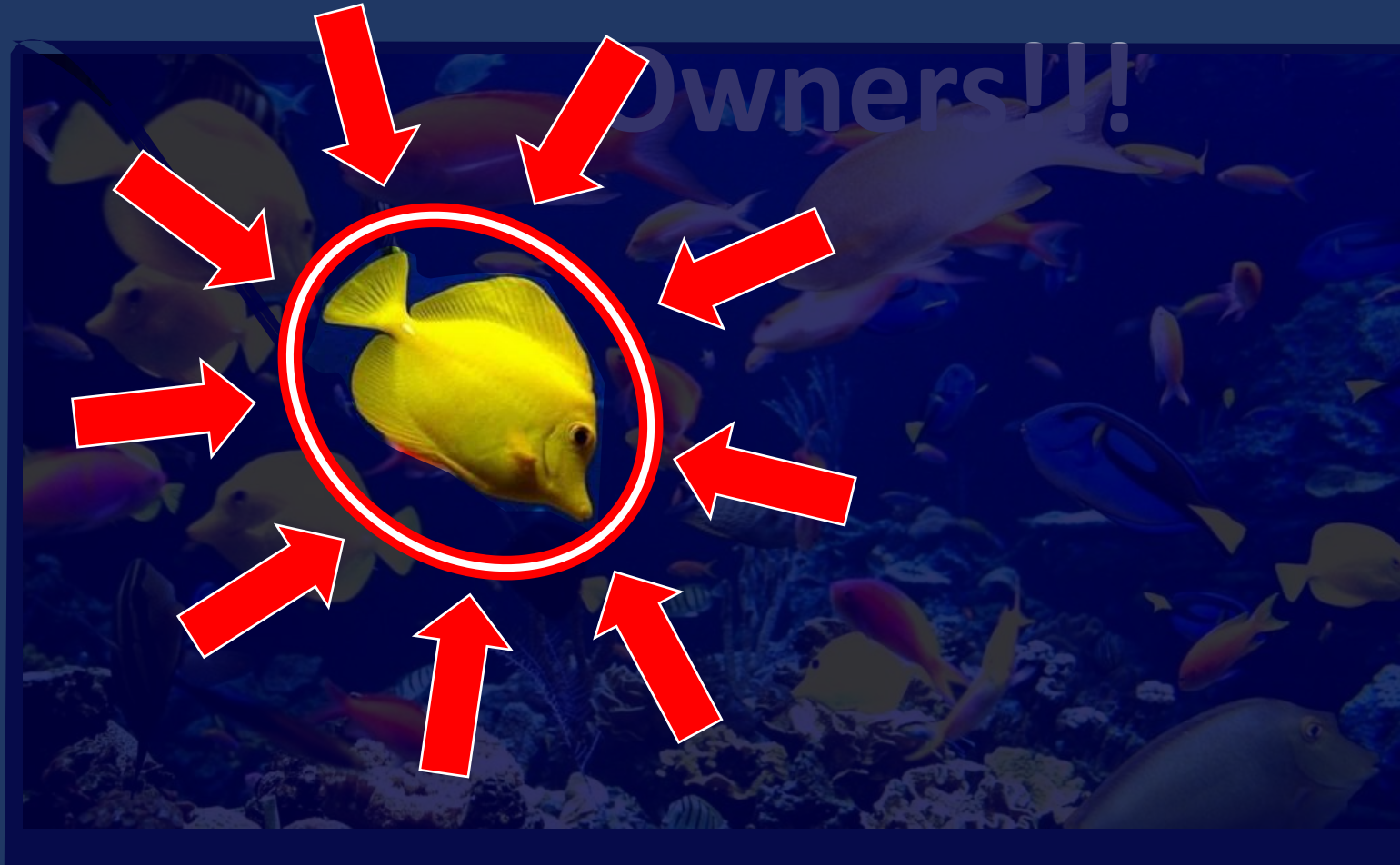
Supplier B



You Are Not The Only “Fish” In The Sea... Vendors Have Options!



Your Goal: You Want To Look More Attractive Than All Other Current



If You Look Dangerous....



...So What Are The Most
Important Items To The
Supplier?

1. Can I Provide What You Need?

- SOW
- Budget
- Schedule

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- SOW
- Budget
- Schedule

2. ***What Are The Odds That I Can Win?***

- Perceptions of being open, fair, and transparent
- Criteria & weights

1. Can I Provide What You Need?

- SOW
- Budget
- Schedule


2. What Are The Odds That I Can Win?

- Perceptions of being open, fair, and transparent
- Criteria & weights

3. ***How Much Effort Will It Take To Respond***

- Proposal contents

Solicitations Contents

<p>RFP</p> <p>Request For Proposals</p>  <p>Project Name Date Issued</p>	1	Scope of Work	What The Awarded Supplier Will Do
	2	Evaluation Procedures	
	3	Proposal Instructions	
	4	Administrative Requirements	
	5	Submittal Forms & Attachments	

Definition

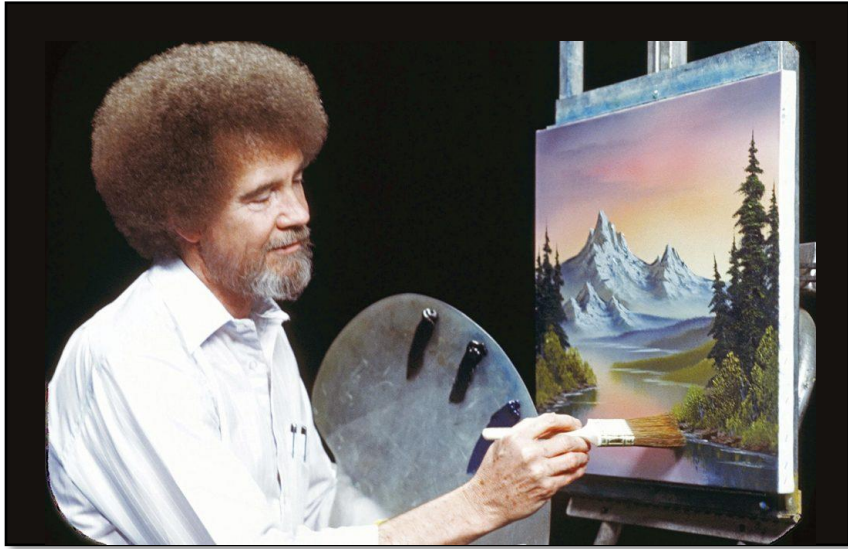
- The Statement of Work (SOW) is an essential part of any solicitation.
- Describes what you are looking to purchase, acquire, or achieve.

Terminology

- Statement of Work (SOW)
- Scope of Work (SOW)
- Specifications or Minimum Specifications
- Requirements or Minimum Requirements
 - Business Requirements
 - Technical Requirements
 - Functional Requirements
- Minimum Qualifications

**SOW =
What you are
Hiring the
Vendor to do**

The Goal of the SOW



- Paint the picture of what success looks like
- Describe what it will take to make you 100% satisfied (what are the outcomes & achievements)
- A good SOW assures that all of the vendors propose a proper solution (that meets your needs)



Workshop Purchasing a Vehicle

"SOW Workshop" Tab

SOW Workshop Form

TEAM MEMBERS:

--

VEHICLES:

SEDAN	1	Kia	\$14,000
	2	Honda	\$16,000
	3	Ford	\$21,000
	4	Chevy	\$23,000

TRUCK	13	Toyota	\$18,000
	14	Dodge	\$22,000
	15	Ford	\$15,000
	16	Chevy	\$28,000

SUV	5	Honda	\$19,000
	6	Toyota	\$29,000
	7	Dodge	\$29,000
	8	Chevy	\$38,000

VAN	17	Kia	\$22,000
	18	Dodge	\$24,000
	19	Chrysler	\$25,000
	20	Honda	\$35,000

LUXURY	9	Audi	\$35,000
	10	BMW	\$60,000
	11	Porsche	\$105,000
	12	Ferrari	\$125,000

FEEDBACK:

SCENARIO #1	SCENARIO #2	SCENARIO #3	SCENARIO #4	SCENARIO #5	SCENARIO #6	SCENARIO #7

Vehicles Selected (#):

Level of Satisfaction with requirements (1-10)
(10 = Extremely Satisfied & 1 = Extremely Dissatisfied):

SCENARIO #8
1
2
3
4
5

CATEGORY		MAKE	TYPE	MILEAGE	COLOR				SEATS	OPTIONS			SAFETY	MSRP
					W	B	R	S		BACKUP CAMERA	REMOVABLE SEATS	TOW PACKAGE		
SEDAN	1	Kia	Used	59,000		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		4				5 Stars	\$14,000
	2	Honda	Used	66,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4				5 Stars	\$16,000
	3	Ford	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4			<input checked="" type="checkbox"/>	5 Stars	\$21,000
	4	Chevy	New	13	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>			5 Stars	\$23,000
SUV	5	Honda	Used	39,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$19,000
	6	Toyota	New	8		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$29,000
	7	Dodge	New	12	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$29,000
	8	Chevy	New	6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$38,000
LUXURY	9	Audi	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$35,000
	10	BMW	New	12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5 Stars	\$60,000
	11	Porsche	New	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		2				5 Stars	\$105,000
	12	Ferrari	New	2			<input checked="" type="checkbox"/>		2				5 Stars	\$125,000
TRUCK	13	Toyota	Used	74,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	3	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$18,000
	14	Dodge	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$22,000
	15	Ford	Used	98,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5			<input checked="" type="checkbox"/>	5 Stars	\$15,000
	16	Chevy	New	24	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$28,000
VAN	17	Kia	Used	47,000	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$22,000
	18	Dodge	New	23	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>			5 Stars	\$24,000
	19	Chrysler	New	17	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$25,000
	20	Honda	New	19	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$35,000

W = White | B = Black | R = Red | S = Silver

Summary of Objectives

- You will play the role of a **salesperson** for a Car Dealership.
- Your task will be to identify the **'best' vehicle** for a customer based on your current inventory of vehicles.



Clarify Assumptions...

- The Salesperson can only offer **1 vehicle**
(**cannot** offer multiple options)
- The Salesperson really wants to make the deal
 - (**would rather not 'lose' the deal** or see client purchase a vehicle from the dealer across the street)

Workshop Form

SCENARIO #1	SCENARIO #2	SCENARIO #3	SCENARIO #4	SCENARIO #5	SCENARIO #6	SCENARIO #7
Vehicles Selected (#):						
Level of Satisfaction with requirements (1-10) (10 = Extremely Satisfied & 1 = Extremely Dissatisfied):						

SCENARIO #8	
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Evaluation Form

TEAM MEMBERS:

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SCENARIO

1

- I need to purchase a vehicle.
- What is the best deal that you can offer me?
- I will be back at the end of the week to purchase the vehicle!

POLL RESULTS



Most Common Feedback...

- *What does “best-deal” even mean?*
- *Open-ended SOW = free for fall, price-gauging, etc.*
- *Some teams will pick most expensive option / Others pick the cheapest*
- *Many teams are frustrated and annoyed and didn’t really spend much effort?*

SCENARIO

2

- I need to purchase a vehicle.
- Here are my expectations:
 - *Need a new vehicle, not used*
 - *Need 5-star safety rating*
 - *Would like it to be black or silver*
 - *Would like Back-Up Camera*
 - *Probably an SUV (3 kids plus 2 adults)*

POLL RESULTS



Feedback...

- Most Common:
 - SUV Dodge @ \$29k
 - SUV Chevy @ \$38k
 - VAN: Dodge @ \$24k
 - VAN Chrysler @ \$25k
- Which cost option **should** the dealer pick (if you can only pick one)?
- It was clearly helpful to have **more** information?
- What was **missing**?

Feedback...

- Be clear on your expectations:

- Need a new vehicle, not used
- Need 5-star safety rating
- Would like it to be black or silver
- Would like Back-Up Camera
- Probably an SUV (3 kids plus 2 adults)

Mandatory Requirements?

Desired Items?

SCENARIO

3

- I need to purchase a vehicle.
- Here are my expectations:
 - *Need a new vehicle, not used*
 - *Need 5-star safety rating*
 - *Do not want a red-colored vehicle*
 - *Would like Back-Up Camera*
 - *Need at least 5 seats (3 kids plus 2 adults)*
 - *Must be able to go/take it camping in the forest*
 - *My maximum budget is \$27,000*

POLL RESULTS



Discussion

- Was it helpful to have the budget?
- Was it helpful to know the purpose/goals/objectives of the vehicle?

Need a new vehicle, not used

Need 5-star safety rating

Do not want a red-colored vehicle

Would like Back-Up Camera

Need at least 5 seats (3 kids plus 2 adults)

Must be able to go/take it camping in the forest

My maximum budget is \$27,000

SCENARIO

4

- I need to purchase a vehicle.
- Here are my expectations:
 - *Prefer a new vehicle, not used*
 - *Would like a 5-star safety rating*
 - *Would prefer a red vehicle*
 - *Would prefer a sedan or SUV*
 - *I plan to tow a small boat to the lake on occasion*
 - *I generally only have 1-2 people in the vehicle, but may have a few more when going to the lake*
 - *Do not want a van*
 - *A maximum budget of \$75,000*

POLL RESULTS



Discussion...

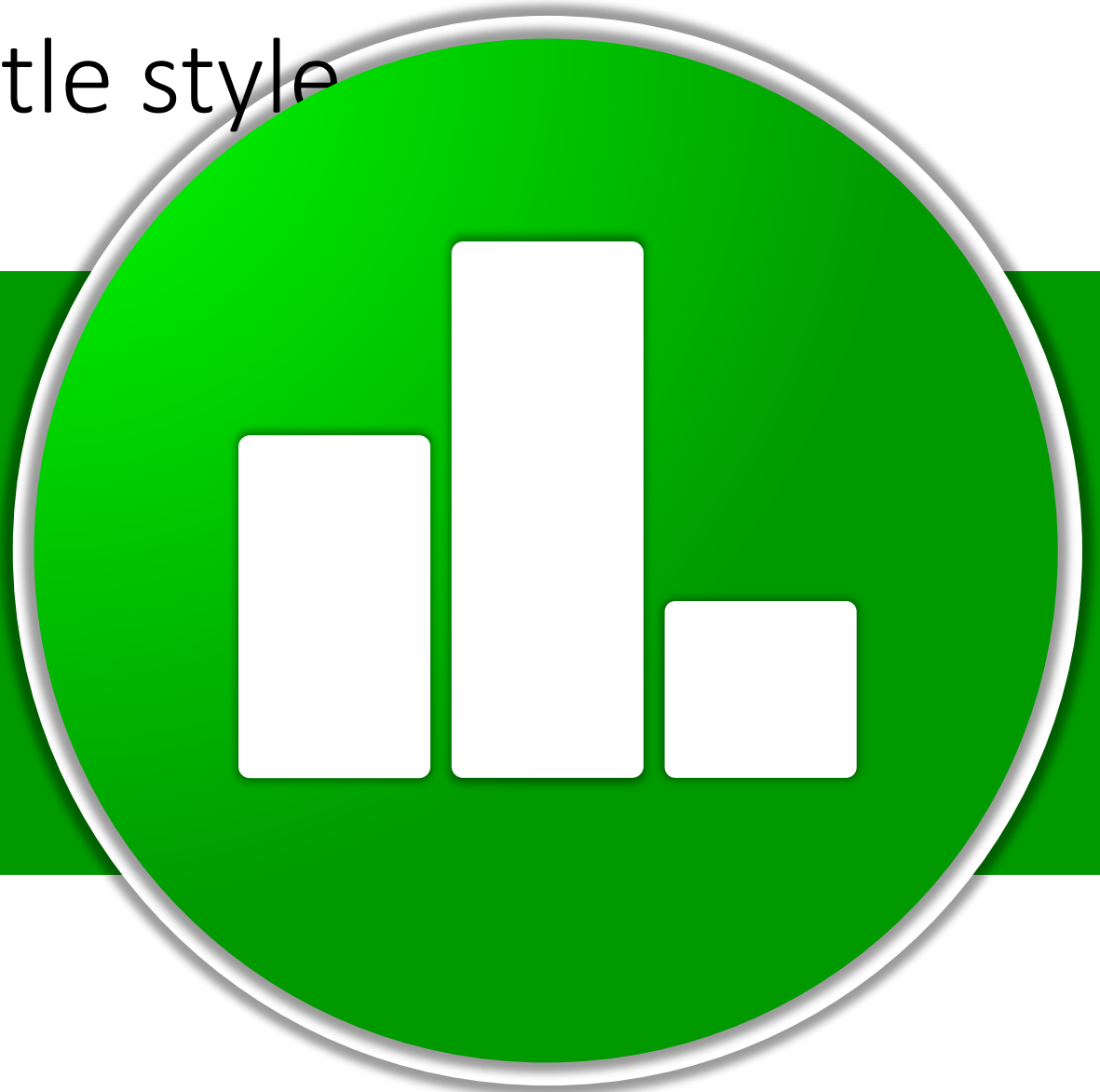
- Was it helpful to know the purpose/goals/objectives of the vehicle?
- Is it OK to release your budget when you have more money than you need?
- Will you always get price-gauged?

SCENARIO

5

- Here are my expectations:
 - *Need a truck*
 - *Must be a new vehicle (not used)*
 - *I will be using this to tow my construction trailer*
 - *Must have back-up camera*
 - *Would prefer a lighter color (white or silver)*
 - *I have a maximum budget of \$20,000*

Click to edit Master title style



Discussion

- Does client have enough money to meet all expectations?
- What are the options?
- What would happen if you didn't release the budget?

SCENARIO

6

- Here are my expectations:

SCENARIO 6

- The vehicle must come with synthetic engine oil
- The vehicle must have windshield wipers
- I was born in May
- I have 3 younger brothers
- My brothers live in the same State
- I work for an IT company
- I would like a new car, not used
- I generally work 40-45 hours per week
- I really like my current vehicle
- I get headaches from the smell of cigarettes
- Do you think I need a tow package
- My house has really cool carpet
- I do not want a red or yellow vehicle
- I have set aside extra funds for the 'right' vehicle
- Vehicle must have a 4-speed automatic or better
- The vehicle should get great MPG
- Vehicle must come with 2 sets of keys
- Vehicle must come with full tank of gas
- I am open to any color vehicle
- I've never been camping
- How do you take a shower in the forest?
- If I get a vehicle, is 5-star better than 4?
- Would like to purchase by end of the week
- Would really like a luxury sedan
- I think SUV's are really cool
- I currently drive a 4-door sedan
- I really like Thai food, but not sushi
- Would like the vehicle to have tinted windows
- The vehicle must have great lights for night driving
- My maximum budget is \$29,000
- The vehicle must have Firestone tires
- The vehicle should have chrome wheels

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Key Takeaways

Common Responses...

- Quality of Scope impacts level of **frustration/satisfaction**
- Quality of Scope impacts how much **time & effort** Proposers spend
- **Budget** is critical
- **Purpose** is just as important as technical specs
- **Not enough** information can frustrate Proposers
- **Too much** information can be just as bad
- All you need is for one Proposer to be **honest**, to get the best deal

Content & Structure of a High-Performing Statement of Work

SOW Content & Structure

Scope Of Work

- 1 Overview
- 2 Goals & Purpose
- 3 Schedule Expectations
- 4 Budget Expectations
- 5 Unique Considerations
- 6 Itemized Requirements

Important Traits

1
Clear &
Concise

2
Accurate

3
Complete

SOW Content & Structure

Scope Of Work

1

1 Overview

2 Goals & Objectives

3 Schedule Expectations

4 Budget Expectations

5 Unique Considerations

6 Itemized Requirements

Overview

- High-level summary
- Easily understandable
- 1-2 sentences (up to 1 paragraphs max)

Overview

- High-level summary
- Easily understandable
- 1-2 sentences (up to 1 paragraphs max)
- *Avoid technical language, jargon, details, or specifics.*

SOW Content & Structure

Scope Of Work

2

1 Overview

2 Goals & Objectives

3 Schedule Expectations

4 Budget Expectations

5 Unique Considerations

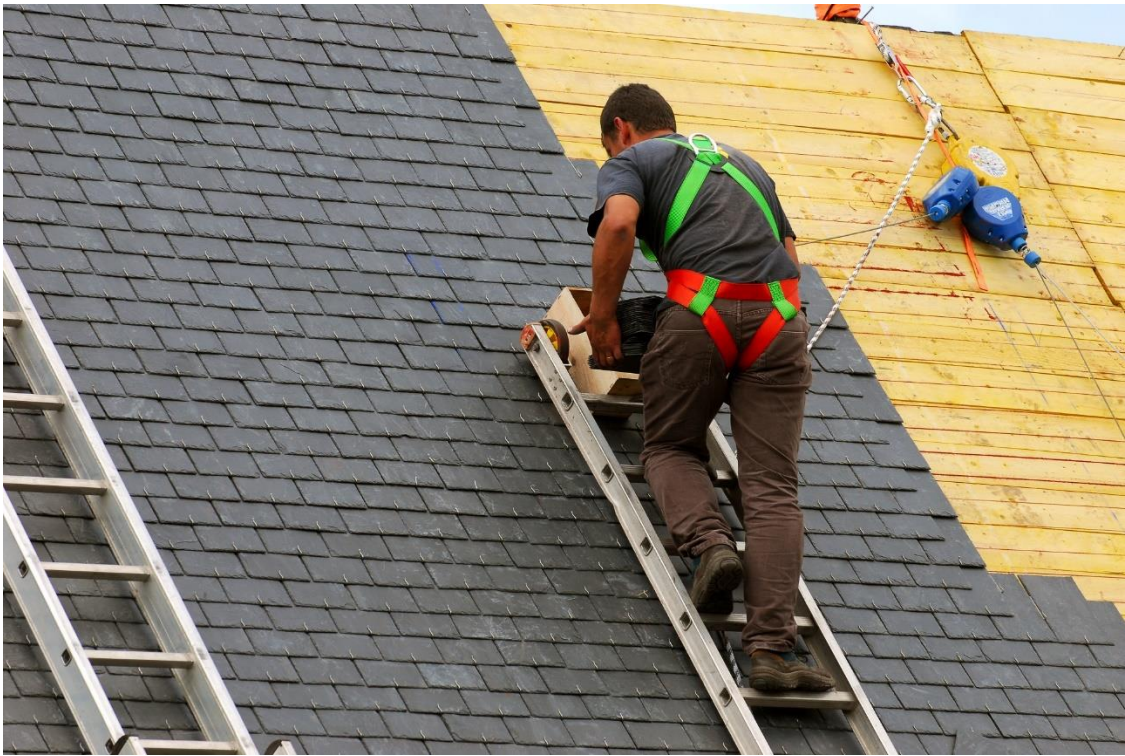
6 Itemized Requirements

Goals & Objectives

- Goals, Objectives, & Motivation
- Primary business drivers and purpose

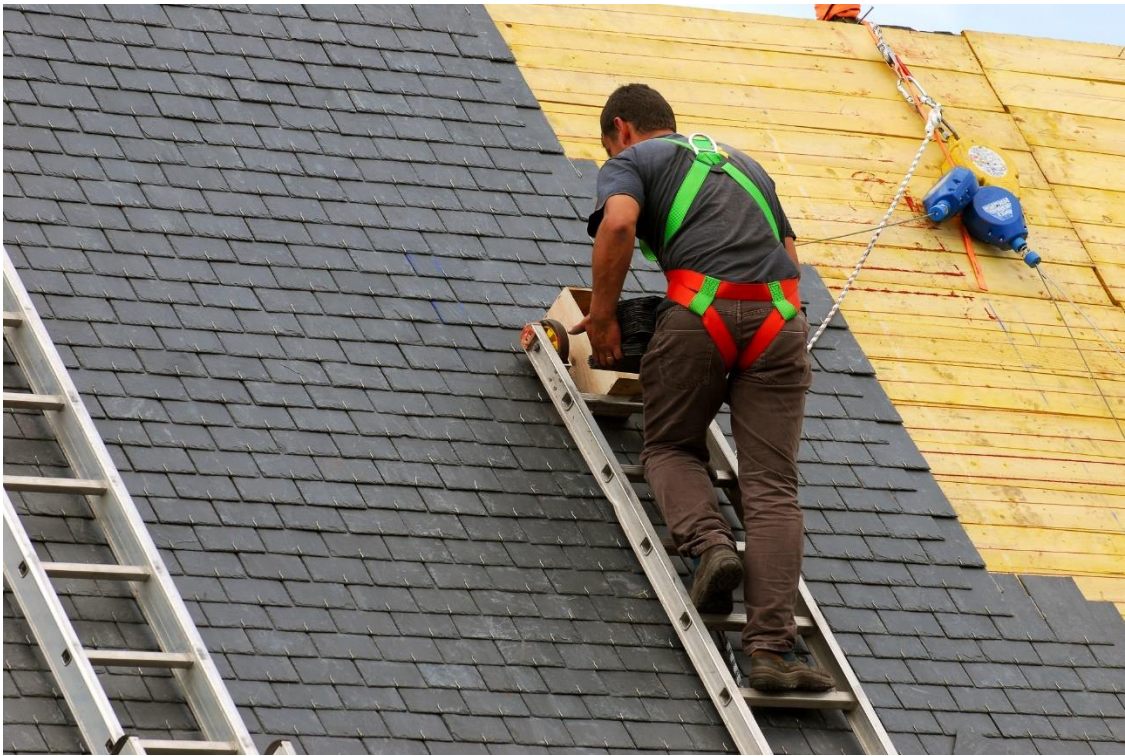
Goals & Objectives

- Install a new shingles on my roof



Goals & Objectives

- Install a new shingles on my roof....or waterproof my building?



Goals & Objectives

- Provide food in the cafeteria...



Goals & Objectives

- Provide food in the cafeteria... or ensure that the students are happy and keep buying more food



Goals & Objectives

- Goal = transport 5 children
- Goal = haul construction material and tow a trailer



SOW Content & Structure

Scope Of Work

3

- 1 Overview
- 2 Goals & Objectives
- 3 Schedule Expectations**
- 4 Budget Expectations
- 5 Unique Considerations
- 6 Itemized Requirements

Schedule Expectations

- Identify all schedule expectations (if any)
- Be clear & transparent (of timing needs and constraints)
- Example:
 - Project must be done during summer break while students are off campus (July 1 – August 15)
 - Existing service contract ends on March 15, so the new service must start on March 16. We anticipate that transitioning will occur at least 2 months prior (January 15).

SOW Content & Structure

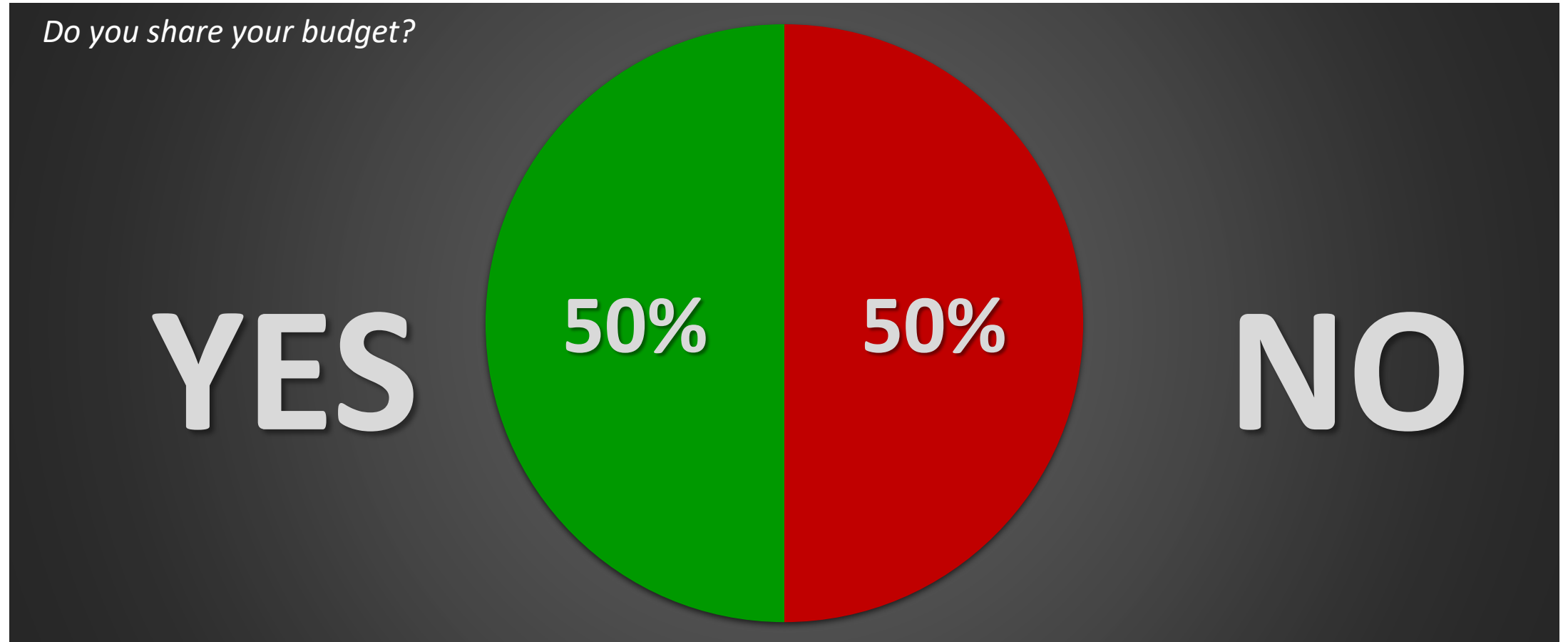
Scope Of Work

4

- 1 Overview
- 2 Goals & Objectives
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Do You Share Your Budget?

Research Shows That...



Sharing Your Budget

- Generally, most professionals have been trained/educated to not share the budget.
- Most common response: *“If we give them our budget, they will all raise their price”*

Assumption

*Hide
The
Budget*

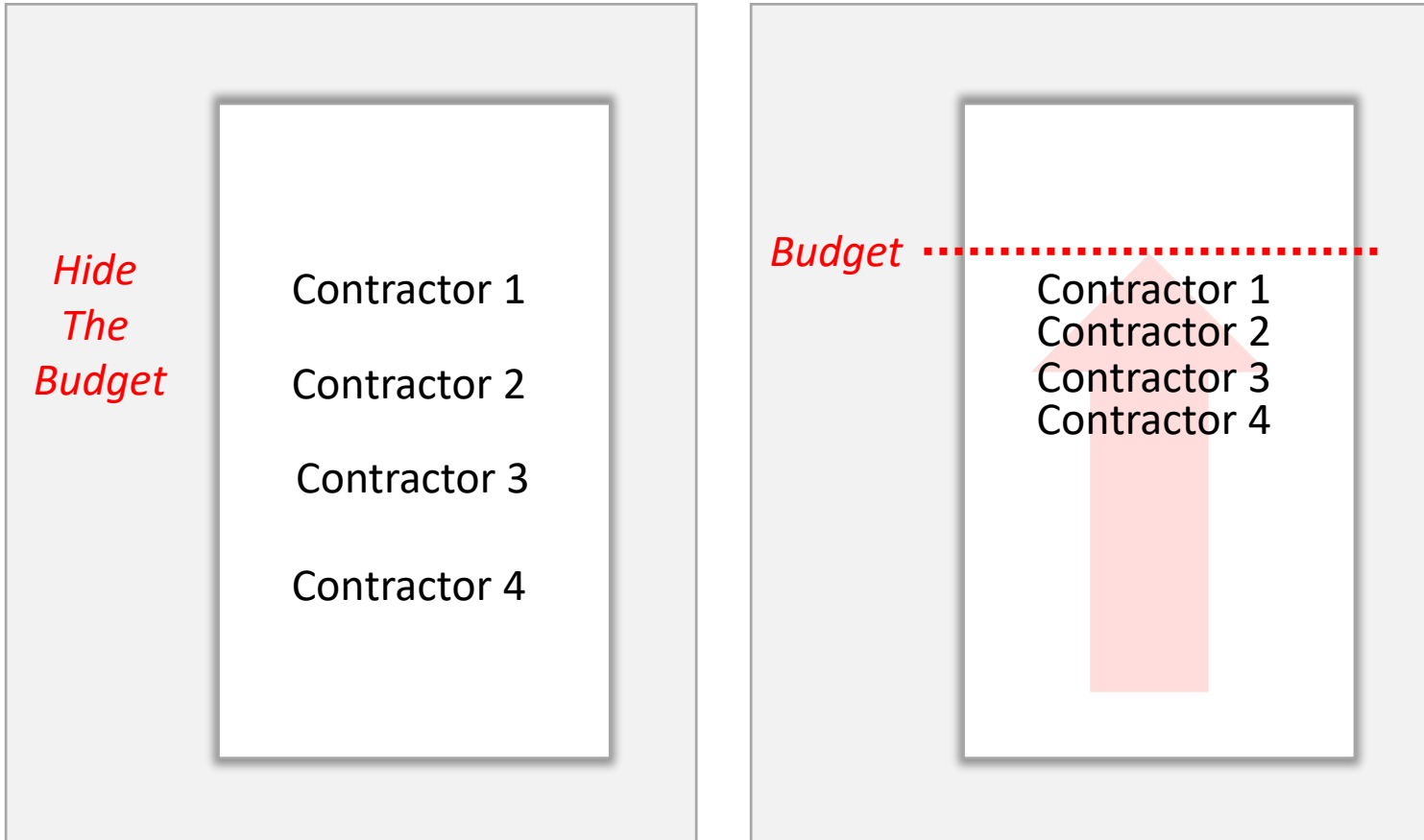
Contractor 1

Contractor 2

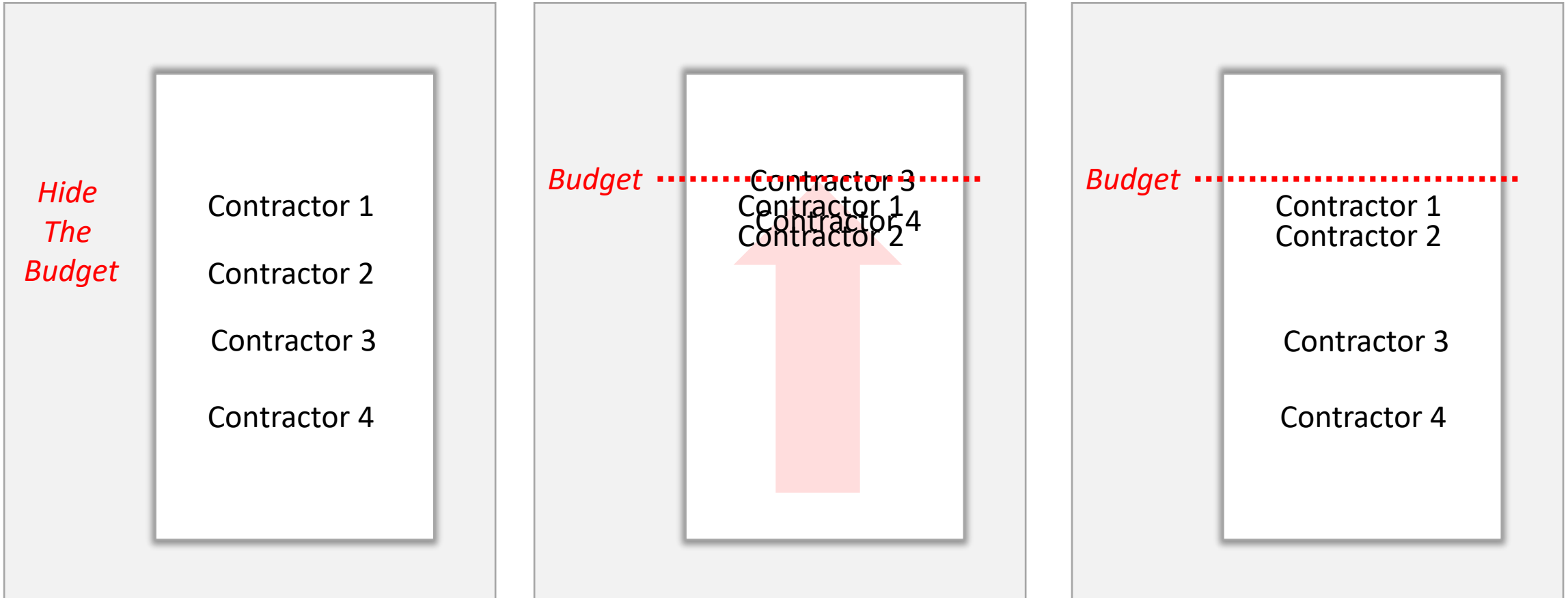
Contractor 3

Contractor 4

Assumption



Reality



Research Does **Not** Prove That Providing Budgets Will Result In Higher Costs

In Summary...

- Analyzed **248 RFPs** that shared their Budgets
- Shared Budget = \$222 Million
- Average Proposals = **36% below** budget

Be Transparent

- The Budget is one of the most important SOW elements
- The Budget is crucial for high-performing suppliers
- The Budget clarifies your technical Statement (what you can afford)

Budget Expectations

- Identify all budgetary expectations (no different than schedule)
- Be direct, such as:
 - The construction budget for this Project is \$150,000
 - The estimated spend for this Project is \$2 Million
 - The project budget is \$3,000,000 over 5 years, of which \$500,000 is allocated for implementation and \$500,000 for annual subscription/support.
- Be clear & transparent (don't play games or cause confusion!)

SOW Content & Structure

Scope Of Work

5

- 1 Overview
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- 6 Itemized Requirements

Unique Considerations

- Identify what may be unusual in your environment (versus the vendor's other clients or projects)
- Identify anything that is unknown or any conditions that are assumed
- Consider other projects or activities that could impact the project
- Provide attachments & exhibits if necessary

Unique Considerations

- Building will house a cyclotron (radioactive material)



Unique Considerations

- Building will house a cyclotron (radioactive material)



- Building is on an island 6 hours from mainland

SOW Content & Structure

Scope Of Work

6

- 1 Overview
- 2 Goals & Objectives
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- 6 Requirements**

Future State

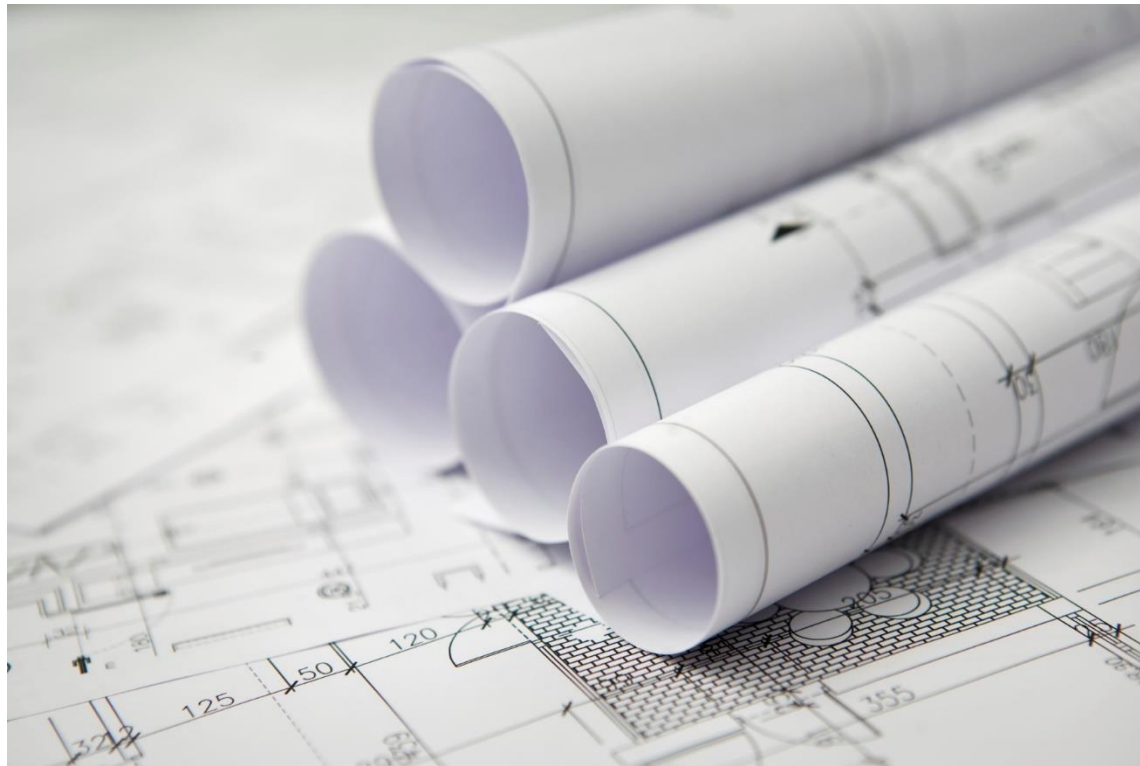
- Describe each of the deliverables/services to be provided by the selected vendor for this Statement of work
- Describe the minimum requirements that must be performed to achieve a 100% satisfaction

Requirements

- Itemized
- Organized into major categories
- Attach (and reference) Exhibits to make this easier to follow (i.e. drawings, specs, pictures, diagrams, site plans, reference files, etc.)
- Do NOT need a written commentary for each requirement

Itemized Requirements

■ Drawings & Specs (Construction)



• Requirements (IT/Software)

ID Num	Requirement Area	Requirement Subcategory	Requirement Name	Requirement
5402	System and Technical	Workflow	Approval / Denial	System shall provide ability to define multiple approval levels for electronic transactions / documents / business events processing.
5403	System and Technical	Workflow	Approval / Denial	System shall provide ability to restrict processing of electronic transactions / documents / business events until they pass all required approval levels.
5404	System and Technical	Workflow	Approval / Denial	System shall provide ability to set up Approver Groups associated with electronic transaction / document / business event processing.
5405	System and Technical	Workflow	Approval / Denial	System shall provide the ability to define a unique approval process for each user and type of document/business event.
5406	System and Technical	Workflow	Approval / Denial	System shall provide the ability to specify multiple approvers for a document/business event where only one of the approvers listed must approve the document in order to consider the document approved.
5407	System and Technical	Workflow	Audit Trail	System shall provide an audit trail of all adds, changes, and deletes to workflow rules.
5408	System and Technical	Workflow	General	System shall ensure that any transaction, document or business event entered into the on-line system is reviewable prior to its saving / processing / commitment.
5409	System and Technical	Workflow	General	System shall provide the ability to reverse / unwind processed transactions, documents and business events.
5410	System and Technical	Workflow	General	System shall permit a minimum of 10 levels of approval that may be established for each type of electronic document/business event.
5411	System and Technical	Workflow	General	System shall allow all authorized users to see the approval status of a document/business event.
5412	System and Technical	Workflow	General	System shall assure that an employee is removed from and added to the workflow process based on qualifying events (e.g., termination from or appointment to agency, or transfer to another organization entity within the agency).
5413	System and Technical	Workflow	General	If a user modifies an electronic document/business event, the system shall allow approvals to be reprocessed in accordance with business rules.
5414	System and Technical	Workflow	General	System shall provide the ability to search/retrieve documents/records based upon user defined criteria.
5415	System and Technical	Workflow	Notification	System shall include a workflow process, with notification options, for business events and documents.
5416	System and Technical	Workflow	Notification	System shall provide the ability to re-route transaction/document/business event for approval based upon user defined criteria such as dollar thresholds or random selection for statistical sampling purposes.
5417	System and Technical	Workflow	Notification	System electronic document management function shall be integrated with the State's electronic mail system or provide other means to alert "reviewer" of documents awaiting approval.
5418	System and Technical	Workflow	Tracking Document(s)	System shall provide ability to track (e.g., identify, record, inquire, report) the progress of electronic transactions / documents / business events.

Traditional Approach

Scope Of Work

- 1 Overview
- 2 Goals & Purpose
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Primary Focus

SOW Content & Structure

Scope Of Work

Bonus

- 1 Overview
- 2 Goals & Objectives
- 3 Schedule Expectations
- 4 Budget Expectations
- 5 Unique Considerations
- 6 Requirements
- 7 Current Conditions**

We spend a lot of time focusing on the Scope...

- What success looks like
- What will make you happy at the end of the contract
- What you want to look like
- What you want to achieve



*...But we forget to
describe what we
look like right now*



Do Your Current Conditions Really Matter?



Impact of a Poor SOW

Perceptions of Owner SOWs

- **Unclear**
- **Information is missing**
- **Overly prescriptive**
- **Unrealistic**
- **Discourages innovation**
- **The owner is “fishing”**
- **Misunderstands Needs**
- *Procurement is Not Fair*

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Impact

- **Fewer proposals**
- Low quality proposals
- **Less qualified teams**
- Less competitive pricing
- **Less consistent pricing**
- Open to interpretation
- **Have to believe the vendor**
- *Brings Risk to the Project*

High Performing SOW

- **Core Objective:** What would a High-Performing Vendor need (or want) to know?

High Performing SOW

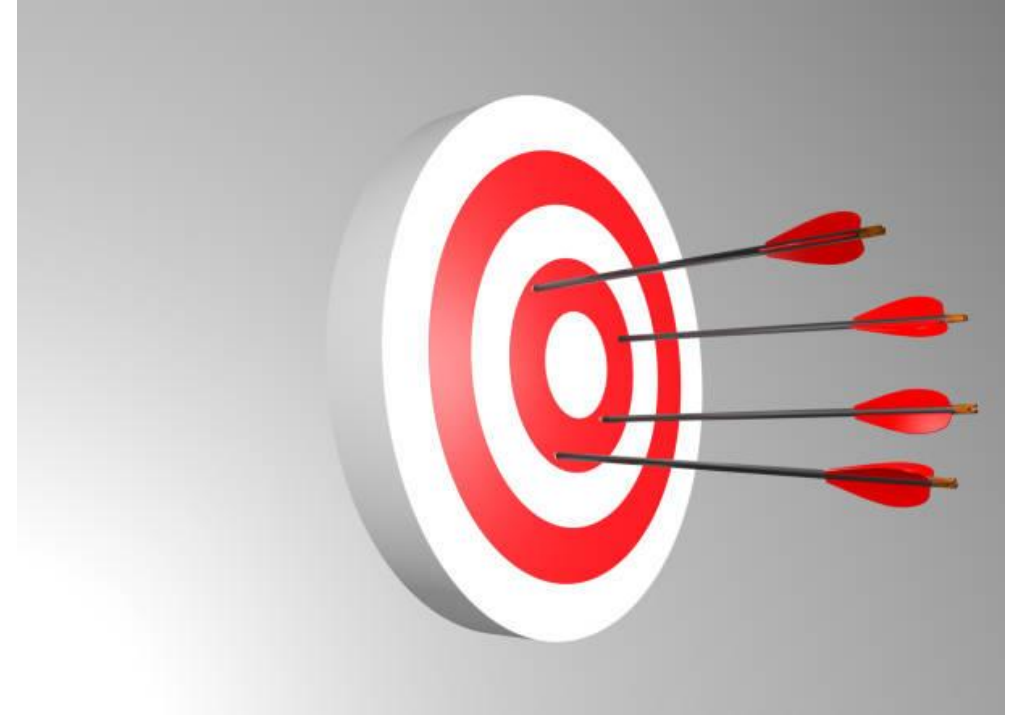
- **Core Objective:** What would a High-Performing Vendor need (or want) to know?
- ALWAYS question whether the SOW....
 - Prevents vendors from **walking away**?
 - Allows vendors to provide the **best price**?
 - Enables vendors to **minimize contingency**?
 - Gives vendors information to **plan their approach**?
 - Allows vendors to propose **apples-to-apples**?

Keep in Mind...

***Goal Is Not
Perfection!***



***Goal Is Not
Perfection!***



***Do Our Best
Within Resource
Constraints***



***...But We
Can't Totally
Miss The
Target!!!***

Templates & Checklists

Free Resource!

Statement of Work Checklist

Client: Insert Name of Organization

Project: Insert Name of Project

Date: Insert Date

Current Effectiveness Assessment

1 = Low (poor or missing) 5 = Average (needs improvement) 10 = High (releasable)

OBJECTIVE
A 100% perfect Statement of Work (SOW) does not exist. The real objective is to create a **High-Performing SOW**.

WHAT IS A HIGH-PERFORMING SOW?
A High-Performing 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.

SOW Element	STATUS	ASSESSMENT
SECTION 1 – OVERVIEW & PURPOSE		
Project Overview: clear, concise, & easily understandable (1-2 paragraphs max)	Complete	1 5 10
Goals, Objectives & Motivation: primary business drivers and purpose	In-Progress	1 5 10
Key Measures of Success: top 3-5 quantifiable metrics (cost, time, quality, function)	Incomplete	1 5 10
SECTION 2 – CURRENT CONDITIONS		
Overview: clear, concise, & easily understandable description of current state	Incomplete	1 5 10
Figures, Diagrams, & References: supporting explanation to describe current state	Incomplete	1 5 10
Pain Points: biggest dislikes, problems, challenges that must be fixed	Incomplete	1 5 10
Strengths: aspects that should remain or be built upon	Incomplete	1 5 10
Volumes/Quantities: describe the level of current operations	Incomplete	1 5 10
Other: other miscellaneous information to paint the picture of current state	Incomplete	1 5 10
SECTION 3 – FUTURE STATE		
Overview: clear, concise, & easily understandable description of future state	Incomplete	1 5 10
Project Deliverables: tangible outcomes to be produced by the supplier	Incomplete	1 5 10
Figures, Diagrams, & References: supporting explanation to describe future state	Incomplete	1 5 10
Transition/Migration: efforts to bring legacy data forward into new system	Incomplete	1 5 10
SECTION 4 – ITEMIZED REQUIREMENTS		
Minimum Requirements (pass/fail): itemized, organized, and categorized	Incomplete	1 5 10
Desired Requirements (value proposition): itemized, organized, and categorized	Incomplete	1 5 10
SECTION 5 – SCHEDULE & BUDGET		
Schedule: clear and transparent identification of timing needs & constraints	Incomplete	1 5 10
Budget: clear and transparent identification of financial needs & constraints	Incomplete	1 5 10
SECTION 6 – UNIQUE CONSIDERATIONS		
Unique: what may be unusual in your environment? (vs. the supplier's other clients)	Incomplete	1 5 10
Unknowns & Assumptions: list any conditions that are unknown or assumed	Incomplete	1 5 10
Attachments & Exhibits: pertinent supplemental information	In-Progress	1 5 10

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For additional information, please contact Jeff Sawyer at jeff@simplar.com

Free Resource!

Statement of Work Checklist

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In-Progress

1 | 5 | 10

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<https://center4procurement.org/cappo/>



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@ 12pm Central

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(learn a new tip, trick, or tool)

30-min Virtual Peer Group

(network with professionals)

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Previous Recordings Available Online!

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Hardware Buys
With Different Scope Packages

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Vendor of
Record Programs

November 18, 2021



7 Most Deadly
Marketing Phrases

December 16, 2021



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Ready for the
Next Level?

January 20, 2022



Best Practices for
Evaluator Training

February 17, 2022



Got RFP Soft Skills?

March 17, 2022



Best Practices for
Evaluator Training

February 17, 2022



Got RFP Soft Skills?

March 17, 2022



IT Software
Demonstrations

June 16, 2022



Amazing Pre-Proposal
Meetings

July 21, 2022



Responding to
Vendor RFIs

August 18, 2022



Human Dimensions
of Procurement
Professionals

September, 15 2022



center4procurement.org

Additional Presentations

Tuesday @ 2:30pm

Capital Projects & Alternative Delivery

Marriott – San Carlos II

Best Practices in Procuring Enterprise-Level Software Solutions

Marriott – San Carlos I

Tuesday @ 4:00pm

How to Do Market Research More Effectively

Marriott – San Carlos IV

Wednesday @ 8:30am

**Stuck in a Low Bid World?
Recommendations for Procurement Excellence**

Marriott – San Carlos III

Wednesday @ 10:00am

Navigating the Perilous Water of RFP Administration and Procurement

Marriott – San Carlos III