

A Clear Understandable Statement of Work Benefits Any Job

Whether it is a small job within your own department or a fairly sizable undertaking involving outside firms, a clear well written statement of work can result in a much more satisfying working relationship. A good statement of work is no accident and requires careful wording. Here are some basic guidelines to help you produce an effective and comprehensible statement of work.

How long should a statement of work be?

There are no hard and fast guidelines. How long is "A statement?" Commonly a Statement of work will be three or four sentences, up to a paragraph or so. If you find your statement of work approaching the size and complexity of the statement made in the "Declaration of Independence" then you better look at it again. Long tomes contend with the rest of the guidelines presented here. If this happens to you, maybe you had better redefine the project in more understandable components.

Use simple, precise terminology, putting the most important items first.

We've all attempted to read the boilerplate written on the backs of purchase orders or warranties, that's not what we are after in a statement of work. A statement of work is intended to give guidance, not produce a trap for someone. The best way to give guidance is to state what you want done, with the most important aspect stated first. For example: "Produce and make manifest, within the time frame stated in the contract, items conforming to the specifications outlined in the 'Product specifications' as provided by the corporate strategic planning committee" ---What is most important (if you can figure out what is important at all?) Is it the time frame? Is it strict adherence to the specifications?

Documentation? This statement gives no clue as to which is really important to the company. If the designer comes up with an excellent product...too late to hit a seasonal market...!

A better way to state this would be "By 30 March have a working prototype, based on the 'Product specifications' with all design documentation completed as soon as possible thereafter." Here we see that: a.) time is the most important; b.) having a prototype to demonstrate is more important than documentation; c.) specifications are flexible in interest of time ("based on", not "strict conformance to"); d.) we don't care who came up with the product specifications, and don't even need to mention them.

Dispense with "make manifest". If you mean documentation say "documentation". There is nothing holy or "more legal" about pretentious words. On the other hand, don't leave anything important *out*, no matter how you have to say it.

Don't expect every statement of work to be worded the same.

Jobs are different, people are different and perceive the work differently. The important thing is to communicate, accurately what you want, what is the most important, and what you are flexible on. The statement however worded should

answer “who, what, where, when, sometimes why, and how”.

Have the other party participate in formulating the statement of work.

To start have the person who will be responsible for doing the work write up a trial statement of work, as they understand it. Make it a first pass. Likely you will have had a meeting, and each *think* you know what the other wants or agreed to. You may be quite surprised by what comes out, but *NOW* is the time to be surprised, not after you have been on a sidetrack wasting time that should have gone toward completion of the project!

“The statement of work is a contemporary document; it provides daily guidance...”

Sit down and clarify the issues, then each of you repeat the process with the corrected first pass as the starting point. What you will reach is a “meeting of the minds” which is the legal basis for any agreement. Don’t make the statement an end in itself, you should only need a couple of iterations. If you consistently don’t agree then you may have other problems to resolve. The whole purpose is to understand each other. Sometimes you just don’t see eye to eye,

more often this process is the beginning of a *friendship* which can be quite satisfying!

Don’t be afraid to modify the statement of work at some point in the future.

An example will illustrate why you need to be flexible: “...to work on budget proposals, advising president Bush at the end of the first quarter of 1995”. Oops! Conditions *change*, what seemed cut and dried one day may not be the next (Bush *lost* the election in 1992). The statement of work is a contemporary document, it provides daily guidance, not history. As such you need to keep it up to date. If you have regular reviews of project progress (recommended!) these are good times to discuss this. Don’t go off the other end however, and keep moving the target every week!

On a big job have someone familiar with contracts go over the statement for legal issues.

This isn’t because of suspicion, it is just common sense. Neither of you want a statement that is legally wrong. To do this can only help your agreement. This is usually the last step, after this you both will have come to as complete, accurate, and understandable a statement as possible. This will be the basis of your working together, possibly for months or years, and achieving mutual goals with maximum ease. •

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