

Sample Statement of Work

Project: AI-Powered Reporting Automation

Client: [Client Name]

Prepared by: Adsum AI Pty Ltd

Date: 24 October 2023

Version: 1.0

This document outlines the scope, deliverables, timeline, and investment for the proposed engagement. It forms the basis of our shared understanding and commitment to achieving the project's objectives through the practical application of intelligent automation.

Our approach is designed to translate complex AI capabilities into a tangible operational asset for your business, delivering measurable results with clarity and precision.

Project Overview

The Challenge

Your team invests significant time manually aggregating data and compiling periodic reports. This process is not only resource-intensive but also introduces potential for human error and delays access to critical business insights. The current workflow limits your team's ability to focus on high-value strategic analysis, acting as a bottleneck to data-driven decision-making.

Business Objectives

This project will directly address these challenges to achieve clear, measurable business outcomes. Our goal is to:

- Automate the end-to-end report generation process.
- Eliminate manual data entry and associated errors.
- Free up specialist staff for strategic analysis and interpretation.
- Provide faster, more consistent access to business intelligence.

Proposed Solution: Practical Intelligence

Adsum AI will architect and deploy a bespoke AI agent to orchestrate your reporting workflow. This intelligent system will autonomously connect to specified data sources, process and synthesise the information, and generate the required reports according to predefined templates and schedules.

The solution will be built for reliability and seamless integration, operating quietly in the background to deliver accurate, timely information. It represents a practical investment in operational efficiency, transforming a core business process into a source of competitive advantage.

Scope of Work

This project is structured into four distinct phases, ensuring a methodical progression from initial design to final handover. This approach provides clarity, manages risk, and ensures all stakeholders are aligned at each stage.

In Scope

- **Phase 1: Discovery & Architecture**
 - Conduct workshops to map current reporting processes.
 - Identify and validate all relevant data sources.
 - Design the AI agent's architecture and integration points.

- Define final report specifications and logic.
- **Phase 2: Development & Integration**
 - Develop the core AI agent and its processing logic.
 - Build secure connectors to all specified data systems.
 - Configure the automated report generation and distribution module.
- **Phase 3: Testing & Deployment**
 - Perform rigorous internal quality assurance testing.
 - Facilitate User Acceptance Testing (UAT) with your team.
 - Deploy the finalised solution into the production environment.
- **Phase 4: Handover & Support**
 - Provide comprehensive technical and user documentation.
 - Conduct a training session for key personnel.
 - Offer 30 days of post-launch hypercare support.

Out of Scope

- Changes to underlying data sources or source system APIs.
- Development of new business intelligence dashboards.
- Ongoing management and maintenance beyond the initial support period.

Key Deliverables

Each phase of the project concludes with the delivery of a tangible, well-defined output. These deliverables serve as key milestones, marking the progressive completion of the work and providing clear points for formal review and sign-off.

Phase	Key Deliverable	Description
1: Discovery & Architecture	Solution Design Document	A detailed blueprint of the AI system, data flows, and integration architecture for approval.
2: Development & Integration	Deployed AI Agent	A functional, production-ready AI solution integrated into the target environment.
3: Testing & Deployment	User Acceptance Test (UAT) Report	A summary of testing outcomes and formal client sign-off for solution deployment.
4: Handover & Support	Handover Pack	Comprehensive training materials, user guides, and technical system documentation.

Upon successful completion, the project will deliver a fully automated reporting workflow, resulting in outcomes such as:

- **>80 %** reduction in manual reporting effort
- **100 %** consistency in report formatting and data handling
- **24/7** operational capability for on-demand report generation

Indicative Project Timeline

The following timeline provides a high-level overview of the project schedule, allocating specific weeks to each major phase. This Gantt chart is an estimate and is dependent on the timely provision of required access, information, and feedback from [Client Name].

A detailed project plan with specific milestones and dependencies will be shared during the kickoff meeting.

Phase	Wk 1-2	Wk 3-6	Wk 7-8	Wk 9-10
1: Discovery & Architecture	██████			
2: Development & Integration		██████████		
3: Testing & Deployment			██████	
4: Handover & Support				██████

Key Assumptions

- Client stakeholders will be available for scheduled workshops and meetings.
- Access to required systems, APIs, and data sources will be provided in Week 2.
- Feedback on deliverables will be provided within 3 business days.

Commercial Summary

Our commercial model is designed for transparency and value. The investment is structured on a fixed-fee basis for defined phases, ensuring cost certainty and alignment with the deliverables outlined in this Statement of Work.

Project Investment

Item	Description	Cost (ex. GST)
Phase 1: Discovery & Architecture	Fixed Fee for design, planning, and specifications.	\$15,000
Phase 2-4: Build & Deploy	Fixed Fee for development, testing, and handover.	\$45,000
Total Project Investment		\$60,000

Payment Schedule:

- 50% of Phase 1 fee upon commencement.
- 50% of Phase 1 fee upon approval of Solution Design Document.
- 50% of Phase 2-4 fee upon commencement of Phase 2.
- 50% of Phase 2-4 fee upon successful UAT sign-off.

Project Governance (RACI)

Clear roles and responsibilities are critical for project success. The matrix below defines how we will work together.

Key Activity	Adsum AI	Client Project Manager	Client SME
Responsible, Accountable, Consulted, Informed			
Technical Solution Design	R	C	C
Requirements Sign-off	R	A	C
UAT Execution	I	R	A
Go-Live Decision	C	A	I

Agreement

This Statement of Work (SoW) defines the collaborative engagement between Adsum AI and [Client Name]. By signing this document, both parties agree to the scope, deliverables, timeline, and commercial terms contained herein.

Change Request Process

We understand that priorities can shift. To manage this effectively, any requested changes to the scope defined in this SoW will follow a structured process:

1. A Change Request is submitted in writing, detailing the required modification.
2. Adsum AI will assess the request's impact on project scope, timeline, and cost.
3. A formal variation proposal will be presented to [Client Name] for review.
4. Work on the change will commence only after the variation is approved in writing.

This ensures all changes are transparent, intentional, and mutually agreed upon.

Terms & Conditions

This Statement of Work is governed by the terms and conditions set forth in the Master Services Agreement executed between Adsum AI Pty Ltd and [Client Name] dated [Date of MSA].

Authorisation

Accepted and agreed by the duly authorised representatives of each party.

For: Adsum AI Pty Ltd	For: [Client Name]
Signature: _____	Signature: _____
Name:	Name:
Title:	Title:
Date:	Date: