

# Oakview IT — Sample Statement of Work

## Statement of Work — Sample Template

### Oakview IT Solutions LLC

---

**Client:** [Client Company Name] **Project:** [Brief project name] **SOW Date:** [Date issued]  
**Valid Until:** [Date + 30 days] **SOW Number:** OIT-2024-XXX

---

### 1. Project Overview

[2–3 sentence summary of what we’re solving for the client. What’s the business outcome they’re after? Who is impacted? Why now?]

**Example:** Acme Co. needs to migrate its 18-mailbox email system from GoDaddy Workspace to Microsoft 365 Business Standard, with phased cutover, MFA enforcement, and end-user training. Cutover window is the weekend of [date] to avoid disrupting Monday operations.

---

### 2. Scope of Work

The following work is included in this SOW:

- Inventory current mailboxes, distribution lists, and shared calendars
  - Provision Microsoft 365 Business Standard tenant under client’s billing
  - Configure custom domain (DNS records: MX, SPF, DKIM, DMARC, autodiscover)
  - Migrate all mailbox data using Microsoft’s native migration tools
  - Configure mobile device access for all users (iOS Mail / Outlook app)
  - Enforce multi-factor authentication on all accounts
  - Conduct one (1) 60-minute live training session for end users
  - Deliver written documentation: tenant settings, recovery procedure, admin handoff guide
-

### 3. Out of Scope

The following items are explicitly NOT included in this SOW. Any of these can be added via change order:

- Hardware procurement
  - Active Directory or hybrid identity setup
  - Third-party app integrations (CRM, accounting, etc.)
  - Ongoing managed services after cutover
  - After-hours emergency support beyond the cutover weekend
- 

### 4. Deliverables

---

Deliverable	Format	Due
Pre-migration inventory report	PDF	Week 1
DNS cutover plan	PDF + spreadsheet	Week 2
Migrated tenant + verified mailboxes	Live system	Week 3
Training session	60-min video conference	Week 4
Final documentation package	PDF	Week 4

---

### 5. Timeline

- **Kickoff:** [Date] (Day 0)
  - **Pre-migration audit complete:** Day 7
  - **Cutover weekend:** Day 14–15
  - **Training:** Day 21
  - **Project complete:** Day 28
- 

### 6. Investment

---

Item	Amount
Base migration project (up to 18 mailboxes)	\$X,XXX
[Add-on if applicable]	XXX  * * Totalfixedfee * * **X,XXX**

---

**Payment terms:** 50% deposit upon SOW signing. 50% upon delivery of final documentation. Net 30 from invoice date.

**Hardware / 3rd-party costs:** Microsoft 365 license fees billed directly to client by Microsoft. Estimated \$XX/user/month.

---

## 7. Acceptance Criteria

The project is considered complete when:

- All 18 mailboxes are accessible from the Microsoft 365 tenant
  - All historical email and calendar data is verified intact
  - All users have successfully logged in with MFA
  - DNS records are propagated and verified
  - The training session has been delivered
  - Final documentation has been received by client
- 

## 8. Change Orders

Any changes to this SOW must be documented in a written change order signed by both parties before work proceeds. Change orders may affect the timeline and the total fee.

---

## 9. Account Ownership

All accounts created during this engagement (Microsoft 365 tenant, domain registration, DNS hosting, etc.) will be created under client's billing and with client as primary administrative owner. Oakview IT will receive secondary administrator access for the duration of this project, which client may revoke at any time.

---

## 10. Termination

Either party may terminate this SOW with seven (7) days written notice. In case of termination by client, Oakview IT will be paid for work completed up to the termination date, prorated against deliverables. Any deposit not yet earned will be refunded within 30 days.

---

## Signatures

**For Oakview IT Solutions LLC:**

Maxim Reilly, Founder Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**For [Client Company Name]:**

[Client signatory name and title] Signature: \_\_\_\_\_ Date: \_\_\_\_\_

---

*Oakview IT Solutions LLC · Buffalo, NY · oakviewit.com · 716-239-0854 · support@oakviewit.com This is a sample template provided for transparency. Real SOWs are tailored to each engagement.*