**[A green sign with white text

Description automatically generated](https://www.smartsheet.com/try-it?trp=11888&utm_source=template-word&utm_medium=content&utm_campaign=Consultant+Scope+of+Services-word-11888&lpa=Consultant+Scope+of+Services+word+11888)CONSULTANT SCOPE OF SERVICES   
TEMPLATE**

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| **CONSULTING FIRM** | Name |
| **PROJECT MANAGER** | Name |
| **PHONE** |  |
| **EMAIL** |  |
| **MAILING ADDRESS** |  |
| **CLIENT** |  |
| **DATE** | MM/DD/YY |

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| 1. PURPOSE | | |
| Explain the purpose of the document, such as outlining the scope and expectations of consulting services. | | |
| 2. SCOPE OVERVIEW | | |
| Describe the consulting project or contract. Define the primary goals and objectives of the consulting services. | | |
| 3. SCOPE OF CONSULTING SERVICES | | |
| Specify the consulting services to be provided. Include details on the consulting approach, methodologies, and deliverables. | | |
| 4. CONSULTANT RESPONSIBILITIES | | |
| List the responsibilities of the consultant or consulting team. Include tasks, project management, communication, and reporting responsibilities. | | |
| 5. PROJECT TIMELINE | | |
| Present a timeline or schedule of deliverables, milestones, and deadlines. | |  |
| **DELIVERY DATE** | **DELIVERABLES** | **NOTED MILESTONES** |
| MM/DD/YY |  |  |
| MM/DD/YY |  |  |
| MM/DD/YY |  |  |
| MM/DD/YY |  |  |
| 6. CLIENT RESPONSIBILITIES | | |
| Outline the client's responsibilities, including the provision of necessary information and resources. | | |
| 7. CONSULTING FEES AND PAYMENT | | |
| Detail the consulting fees, payment terms, and invoicing procedures. | | |
| 8. CONFIDENTIALITY AND DATA PROTECTION | | |
| Address confidentiality and data protection measures, including the handling of sensitive information. | | |
| 9. INTELLECTUAL PROPERTY | | |
| Specify ownership of any intellectual property created during the engagement. | | |
| 10. COMMUNICATION AND REPORTING | | |
| Describe how communication will occur between the consultant and the client. Outline the reporting frequency and format. | | |

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| 11. CHANGE MANAGEMENT |
| Explain the process for handling changes to the scope of services or project requirements. |
| 12. TERMINATION AND DISPUTE RESOLUTION |
| Include provisions for contract termination and dispute resolution procedures. |
| 13. LIABILITY AND INSURANCE |
| Discuss liability and insurance requirements, if applicable. |
| 14. ETHICAL GUIDELINES |
| Highlight adherence to professional and ethical standards in consulting. |
| 15. CLIENT FEEDBACK AND EVALUATION |
| Explain the process for client feedback, satisfaction surveys, and project evaluation. |

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| 16. REFERENCES AND CASE STUDIES | |
| Include relevant references or case studies of similar consulting projects. | |
| 17. TERMS AND CONDITIONS | |
| Incorporate any specific terms and conditions relevant to consulting engagements. | |
| APPENDICES | |
| Attach any additional documents, such as consulting proposal or work plan. | |
| SIGNATURES | |
| **PROJECT MANAGER** |  |
| **SIGNATURE** |  |
| **DATE** | MM/DD/YY |
| **CLIENT** |  |
| **SIGNATURE** |  |
| **DATE** | MM/DD/YY |

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