

Enterprise Proposal and SOW Guide

A buyer-oriented checklist for turning discovery into a bounded statement of work with measurable artifacts and explicit exclusions.

Buyer problem

Professional-services proposals often leave deliverables, acceptance, authority, data handling, payment, and scope change ambiguous.

Commercial structure

- Name the business problem and decision supported
- Define system, data, environment, and stakeholder boundaries
- List deliverables as retained artifacts
- Define schedule, milestones, payment, and acceptance
- State assumptions, client responsibilities, and exclusions

Risk and governance

- Define access and data-handling channels
- Separate advice, review, implementation, and operations
- Set change-control and delay rules
- Define background IP and client-specific work product
- Bound warranty, support, liability, and third-party dependencies with counsel

Closeout

- Require final evidence inventory and open-risk register
- Define knowledge transfer and exportable formats
- Name next-decision criteria instead of automatic expansion
- Document what is not complete

Related engagement

Service	Joint Discovery & Architecture Workshop
Duration	2 working days plus preparation and readout
Starting investment	\$5,000
Payment	Paid before scheduling
Decision supported	Whether a specialist workstream is viable, how it should be bounded, and what proposal-ready next scope is justified.

Usage boundary: General commercial guidance, not legal advice or a substitute for qualified counsel.

Last reviewed 2026-07-23 | HTML version: <https://longtermcapabilities.com/resources/enterprise-proposal-template/> | Contact: 1 (464) 274-1476 / consulting@longtermcapabilities.com