**Scope of Work Questionnaire**

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| **Prepared For:** |  | **Date Prepared:** |  |

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| **New Engagements**  |
| 1. What needs to be done? What is the purpose of the work?  |
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| 2. Who will do what? |
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| 3. When should it be done? What is the duration of the engagement? |
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| 4. How will it be done? (i.e., in person vs virtually) |
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| 5. What are the required deliverables?  |
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| 6. Are there project milestones? |
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| 7. What is the total cost of the services? |
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| 8. What is the payment schedule? |
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| **Current Engagements** |
| 9. Have you provided any new services in the past year? |
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| 10. Is what you are doing great or just sufficient? What can you do that your clients either need or are getting from someone else that you could do for them? |
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| 11. Have you provided services you did not charge for? Were they necessary due to changing circumstances or under rushed conditions? Were they done to make up for work that should have been done? |
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| 12. Is there profitability? Can anything be changed (i.e., assigning the right staff) to increase profitability? |
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| 13. Is there a way to eliminate as much nonclient and non-firm growth services? i.e., administrative work or professional services that other staff /software could do? |
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| 14. Consider feedback from the client - opportunity for referrals |
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