

## ENPOINTE | SCOPE of WORK (SoW) Meeting Outline

<b>Customer Name</b>		<b>Account Executive</b>	
<b>Meeting Date</b>		<b>Sr. Project Manager</b>	
<b>SoW Summary #</b>		<b>Project Manager</b>	
<b>Attendees</b>			

- ☐ Schedule Meeting with Necessary Staff/Management
- ☐ Bring Samples of All Product/Each Component to meeting to share as a visual
- ☐ Bring any other Items/Examples needed to explain project
  - I. Explain the **purpose of the meeting** (it is to highlight/discuss risks – ensure group understands job complexities – and to see if there are any opportunities for improvement or efficiencies);
  - II. **Step through project workflow (once-over review of entire job)** – then go back and identify the risk areas, or functions: (please discuss any issues you see and then ask for input)

**MINUTES:**


Action Points		Responsible Party	Due Date
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- ☐ In addition, send out a written email to all parties immediately following the initial Scope of Work meeting whereas you outline the discussion and decisions made during the meeting (this form along with the Scope of Work Summary Form - make sure the summary #s match so they can be associated with one another)

- ☐ Save a copy to the customer folder on the network drive to ensure access at a later time.

- ☐ Schedule Pre-Production meeting(s) proactively prior to production of LIVE project(s). Connect with production teams to review the project(s) and send a written email of instructions/highlights.

*(add outlook/calendar reminder if necessary to remind yourself to send, etc.)*

**\*\*\*Be sure to save the Pre-Production minutes to the customer folder on the network drive to ensure access at a later time.**

- ☐ Make certain any important instructions/decisions are clearly captured within the SoW Summary Form and within the **LIVE TICKET** for operators/shop floor.