**[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+Example-word-11888&lpa=Consultant+Scope+of+Services+Example+word+11888)CONSULTANT SCOPE OF SERVICES   
TEMPLATE EXAMPLE**

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| **CONSULTING FIRM** | Smith Consulting Group |
| **PROJECT MANAGER** | John Smith |
| **PHONE** |  |
| **EMAIL** |  |
| **MAILING ADDRESS** |  |
| **CLIENT** | ABC Tech Solutions |
| **DATE** | MM/DD/YY |

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| 1. PURPOSE | | |
| This Consultant Scope of Services document outlines the terms and conditions for the consulting engagement between Smith Consulting Group and ABC Tech Solutions. The purpose of this document is to define the scope, responsibilities, and expectations for both parties. | | |
| 2. SCOPE OVERVIEW | | |
| The consulting engagement aims to develop a comprehensive digital marketing strategy to enhance ABC Tech Solutions' online presence and customer engagement. | | |
| 3. SCOPE OF CONSULTING SERVICES | | |
| The consultant shall provide the following services:  • Conduct market research to identify target demographics.  • Develop a digital marketing strategy encompassing SEO, social media, and email marketing.  • Provide monthly performance reports and recommendations. | | |
| 4. CONSULTANT RESPONSIBILITIES | | |
| The consultant shall:  • Conduct market research and competitor analysis.  • Develop and implement SEO strategies.  • Create engaging social media content.  • Monitor campaign performance and adjust strategies as needed.  • Provide monthly progress reports to the client. | | |
| 5. PROJECT TIMELINE | | |
| Present a timeline or schedule of deliverables, milestones, and deadlines. | |  |
| **DELIVERY DATE** | **DELIVERABLES** | **NOTED MILESTONES** |
| MM/DD/YY | Completion of market research |  |
| MM/DD/YY | Launch of digital marketing campaigns |  |
| MM/DD/YY |  | Submission of final performance report |
| MM/DD/YY |  |  |
| 6. CLIENT RESPONSIBILITIES | | |
| The client shall:  • Provide access to existing marketing data and website analytics.  • Appoint a designated contact person for communication with the consultant. | | |
| 7. CONSULTING FEES AND PAYMENT | | |
| The consulting fee for this engagement is $10,000 per month, payable in monthly installments. Invoices will be submitted on the 1st day of each month. | | |
| 8. CONFIDENTIALITY AND DATA PROTECTION | | |
| Both parties agree to maintain the confidentiality of all project-related information and data. Any sensitive information will be handled in accordance with applicable data protection laws. | | |
| 9. INTELLECTUAL PROPERTY | | |
| Any intellectual property created during the consulting engagement shall be owned by ABC Tech Solutions. | | |
| 10. COMMUNICATION AND REPORTING | | |
| Regular communication will occur through email and bi-weekly meetings. Progress reports will be submitted monthly in PDF format. | | |

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| 11. CHANGE MANAGEMENT |
| Any changes to the scope of services or project requirements must be agreed upon in writing by both parties. |
| 12. TERMINATION AND DISPUTE RESOLUTION |
| In the event of termination, either party must provide 30 days' written notice. Disputes will be resolved through mediation. |
| 13. LIABILITY AND INSURANCE |
| Smith Consulting Group carries professional liability insurance. ABC Tech Solutions agrees to hold harmless and indemnify Smith Consulting Group for any claims arising from the engagement. |
| 14. ETHICAL GUIDELINES |
| Smith Consulting Group shall adhere to the highest ethical and professional standards throughout the engagement. |
| 15. CLIENT FEEDBACK AND EVALUATION |
| Client feedback is encouraged, and a post-engagement evaluation will be conducted to assess project outcomes. |

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| 16. REFERENCES AND CASE STUDIES | |
| Smith Consulting Group may use this engagement as a reference and potentially include it in case studies for promotional purposes, subject to client approval. | |
| 17. TERMS AND CONDITIONS | |
| Any additional terms and conditions specific to this engagement are outlined in this document. | |
| APPENDICES | |
| Attach any additional documents, such as consulting proposal or work plan. | |
| SIGNATURES | |
| **PROJECT MANAGER** | John Smith (Smith Consulting Group) |
| **SIGNATURE** |  |
| **DATE** | MM/DD/YY |
| **CLIENT** | Alice Johnson (ABC Tech Solutions) |
| **SIGNATURE** |  |
| **DATE** | MM/DD/YY |

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