# Sample SOW: AI assistants and CRM workflows

PixelCrayons | Sample for review | 9 October 2026

Use with the Agency Services Agreement, identified by date and version below. This sample does not authorise work. Complete the commercial fields and approve proposed terms before signature. Attach only this relevant SOW rather than the entire service library.

Provider: [Select ValueCoders India LLP for an Indian customer, or ValueCoders Services LLP for an international customer]. Contracting address: 703 Sector 15 Part 2, Gurugram 122001, Haryana, India. Agency: [full legal name and address].

## Engagement particulars

Every service needs the following details, even where a published package is selected.

| Field | Complete before payment |
|---|---|
| Parties and agreement reference | [Legal names; agreement date] |
| Client/project/account identifier | [Name or confidential identifier] |
| Selected service and exact scope | [Package, quantities, inclusions and exclusions] |
| Required inputs and permissions | [Inputs, owner, due dates] |
| Account manager and escalation contact | [Names and emails] |
| Agency approver | [Name and backup contact] |
| Channels and working calendar | [Hours, timezone, holidays and response targets] |
| Deliverables and acceptance | [Evidence/checklist for each output] |
| Start, review, completion or billing dates | [Dates and timezone] |
| Fees and payment | [Currency, tax, instalments, due dates] |
| Value allocation | [Deliverable/milestone values, totalling the fee] |
| Third-party costs and permissions | [Payer, subscriptions, usage caps, renewal, branding] |
| Data, AI and rights | [Approved access/tools, licences, processing addendum] |
| Commitment and exit | [Applicable schedule, notice, refund process] |
| Handover and support | [Files, access, records and support coverage] |
| Signatures | [Both parties, names, titles and dates] |

For ongoing work, allocate the period fee across deliverables or reserved capacity. Unfinished work owed by the Provider does not simply expire on a calendar boundary. Never charge the same task under a package and again under shared hours.

## Service-specific terms

**Suitable for:** standard-platform FAQ assistants, knowledge assistants and bounded integrations.

Specify the platform and plan, authorised sources, document/FAQ limits, languages, connected systems, triggers/actions, field mappings, expected usage and acceptance tests. Distinguish configuration from custom model development. Define exactly which actions the system may take and which need human approval.

Before implementation, agree subscription costs, API/model charges, branding, usage caps, logs, data retention and ownership of accounts. Disclose vendor limitations and paid branding removal. Use approved content and non-sensitive test data where possible. Personal data requires agreed processing/security terms before transfer.

Acceptance tests cover representative correct answers or workflow results, unsupported questions, refusal/fallback, human handoff, field validation, duplicate/failure handling and permitted access. Name the test cases and tolerances. Do not describe a passing demonstration as proof that every future answer will be correct.

The Agency approves deployment. Deliver configuration/export where supported, source-content inventory, operating instructions and rollback/disable steps. Record who monitors failures, updates knowledge and pays platform bills after handover. A maintenance subscription is optional unless expressly selected.

The build includes the agreed reviews, QA and 30 days of corrective maintenance after production launch; qualifying reported issues remain open until resolved. New source material, new integrations, provider API changes and ongoing optimisation are separate unless included. Platform changes do not excuse a defect already present in agreed work.

If reliable scoping requires investigation, commission a separate paid pilot or feasibility SOW first, without representing its prototype as production-ready.

**Integration safeguards:** define the system of record, mapping approvals, duplicate handling, retry limits, failure alerts and rollback. Use a sandbox or approved test records before live writes. No production deletion, mass messaging, payments or consequential automated decisions without specific approval and controls. If the vendor changes an API or model, assess impact and agree changes before extra work; Provider implementation errors remain covered by correction obligations.

## Deliverable and commercial record

| Output or reserved capacity | Acceptance evidence / availability record | Due date / period | Allocated fee |
|---|---|---|---|
| [Specify] | [Objective checks] | [Date and timezone] | [Currency and amount] |

Total fee: [amount and currency]. Payment dates: [dates]. Third-party costs: [itemised approved costs or None]. Proposed terms accepted or varied: [identify each selection]. Supporting MSA version and date: [identify and attach]. The allocated values must total the agreed fee. This SOW does not override legal terms unless an express signed variation identifies the relevant MSA clause.

## Approval and signatures

Provider authorised signatory: [name, title, signature, date]. Agency authorised signatory: [name, title, signature, date]. The Provider and Agency each receive the completed MSA and SOW, including attachments, before signing.