How to “address the SOW” completely but succinctly

The Problem

Sometimes a Request for Proposal (RFP) gives you tight page limits for the response as well as a vague instruction like “The response should address every element of the Statement of Work (SOW).” In that case, do two things:

- First, ask the client for clarification/specification of that requirement. Do they really want a paragraph-by-paragraph or line-by-line response of some sort? Really?
- Then, if you get an answer that leaves you trying to get a checkmark for every SOW line item, consider the tabular option as opposed to a narrative response.

Why Not Just Write a Narrative Response?

Paragraph-by-paragraph responses are tedious to write and as boring to edit as I assume they are to evaluate. And boring means that it’s easy to miss things in reviewing them. Also, for what they communicate they take too much space. Worse, they often degenerate into mere regurgitation of the SOW they’re supposed to be responding to.

The Tabular Solution

The Target

- To show you’ve “addressed” every SOW line item
- To explain how you’ll meet each requirement by giving value-added not regurgitated content
- To use the least space

The Method

Set up and complete this table, in landscape view.

A-SOW Ref	B-SOW Requirement	C-Specifics on How You’ll Do It	D-Notes (optional)

The Details for each Table Column

A-SOW Reference

Put the number (only) of “each” SOW line item here.

Does that mean you have to write to every dagnabbed SOW line item? Maybe not, but you must:

- Choose a sensible/defensible level of aggregation that works throughout each function (ideally throughout the whole SOW), trying not to mix apples and oranges together while also trying to avoid describing how you’ll handle every individual apple
- Make it clear that you’re addressing all subordinate line items within their higher-level ones, where you *are* doing that with repetitive line items

- Pick out any subordinate items that need a different answer or more content and address them individually, either on their own line or in the **D-Notes** column – for example, maybe your proposed method for preventive maintenance is the same for all vehicles in the fleet, except that you inspect mission-critical vehicles more often or on more aspects
- Leave no obvious gaps. Gaps defeat the primary purpose of the table, which is to show at a glance that you've addressed every SOW item at some level.

B-SOW Requirement

Since the purpose of this is to save pages, this column can't usually include the whole SOW requirement. Nor does it need to, but it must do this:

- Give the heading if there is one (shorten it if it goes on and on and on – some do)
- Give a short and recognizable summary of the requirement topic if there isn't a summary heading – preferably not longer than one line

Its only purpose is to confirm which requirement you're writing to, mostly to facilitate reviews by those who haven't memorized the SOW. When completing the table, writers must NOT use this short form as a substitute for reading the SOW, because the short form will necessarily exclude important details.

If the line item is just a title with no actual Work, shade out that line and explain that where no response is possible or required, you haven't burdened yourselves or evaluators by making something up just so the table looks complete. Say it better than that.

C-Specifics on How You'll Do It

Ah, now we get to it. Make a standard set of topics that make sense for this function and that describe how you'll meet that requirement. What makes sense? That depends on the Work and on the client.

Maybe your client wants to be assured that each SOW line item is already or will be included:

- **In a position description** – Give the position title and attach the full descriptions if needed.
- **In an operations plan** – Give the plan name and section/paragraph number if you can.
- **In a standard operating procedure (SOP)** – Give the title/number or at least indicate ("Yes") that there will be an SOP for this Work.
- **In a quality/inspection checklist** – Give the item number and/or the inspection frequency.

Or maybe your client wants to know all this:

- **Who** – In-house or subcontracted staff or both? Number? Qualifications?
- **What** –
  - **Tools** - Software? Communications system? Special equipment?
  - **Processes** – SOPs? Quality checks? Reporting? Safety protocols?
  - **Standards** – Legislated? Client-specified? Manufacturer-mandated? Company-driven? Specify all that apply.
- **Where** – Where (physically and/or organizationally) will this task/function be done?
- **When** – How often? To what deadline?

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If any of these answers are the same for the whole section, or if you have maybe two or three answers for different chunks of the Work, then pull that content out and put it above the table in bullets or something visual. Don’t repeat content in a way that *you* would find tedious; don’t make readers look for content in a way that *you* would find irritating.

For example, maybe you’ll do maintenance Work at three physical/organizational Wheres:

- **Accounting, record-keeping, reporting** – At your Head Office in Pickle Lake, for cost-effective and consistent performance that meets company and contract standards
- **Preventive maintenance** – At your five satellite offices adjacent to client locations, for timely response and for familiarity with the local fleet and operating conditions
- **Corrective maintenance** – At your central maintenance facility, for quality repairs by manufacturer-accredited technicians

Maybe that will be clear enough, or maybe you’ll decide to explain the rationale outside the table, and also note the Where for each SOW line item.

Look for visual ways to communicate content faster and more clearly. For example, choose a different colour for each of your three Wheres (noticeably different, not three shades of navy blue) or to distinguish in-house from subcontracted staff. Will your colour choices work if the proposal gets printed in black-and-white? Will it work if the reader is colour blind?

Finally, should this content be in **a bunch of subordinate columns** or in **one cell with bolded sub-headings** for each major topic? In other words . . .

This? With subordinate columns?

SOW Ref	SOW Requirement	Specifics				Notes
		Who	**What**	**Where**	**When**	

Or this? With sub-headings within one column?

SOW Ref	SOW Requirement	Specifics	Notes
		Who – **What** – **Where** – **When** –	

That depends on your content:

- If you can get to suitably short entries (for example, one of “Yes/No,” “daily/weekly/monthly,” or “Office/Field”) then break it into columns, which are easier to get at a glance if the text is short.
- If you can’t get that succinct, go with the headings and short blurbs. This is part of keeping the table reasonably compact so it makes sense. Tables that extend over several pages and that have oodles of white space are confusing.

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D-Notes

Is there anything important for this line item that you really really really can’t cover in the standard topics? (Really?) Well, OK, then add this column, but try to do every response the same. It’s a good internal check for completeness and it builds confidence in external reviewers.

One Last Word

Fly before buy. And fly again. Lay out just one section and see how this approach works.

The same principles apply as for all response templates:

- The time to perfect it is before everyone has started populating it.
- The time to get any buy-in you need (like, from eventual executive reviewers) is well before your writers have spent hours working to this format.