

Sample SOW: Automation, AI and CRM

PixelCrayons | Sample for review | 9 October 2026

Sample for discussion, not an executed agreement or quotation. Complete every bracketed field and approve the proposed terms before signature. This SOW is read with the Brand Services Agreement dated [date/version]. The selected package's exact scope and regional price must be recorded.

Parties and engagement details

Provider: [select ValueCoders India LLP for an Indian customer or ValueCoders Services LLP for an international customer], at 703 Sector 15 Part 2, Gurugram 122001, Haryana, India. LLPIN: [insert]. Customer: [legal name, address and registration details]. Project: [reference].

Account manager and escalation contact: [names, emails]. Customer approver and backup: [names]. Working days, holiday calendar, timezone, channels and update cadence: [agree]. Start and delivery/review dates: [dates after required inputs and availability are confirmed].

Scope and commercial record

Field	Complete before signing
Selected service / package	[Name, version and agreed departures]
Deliverables and quantities	[Exact outputs, formats and exclusions]
Inputs and permissions	[Owner, access method and due dates]
Acceptance checks / review rounds	[Objective checks, evidence and rounds]
Fee, currency and taxes	[Regional price confirmed in quote]
Payment schedule	[Advance, milestones or monthly dates and amounts]
Allocated value	[Value of each deliverable, totalling fee]
External costs	[Item, payer, usage cap, renewal or None]
Term and cancellation	[Fixed project or monthly; notice and dates]
Support and handover	[Window, source files, documentation, account access]

Service-specific terms

Select the exact outcome: enquiry follow-up, a CRM connection, booking integration, FAQ assistant or custom workflow. Record systems, supported connectors, trigger/action count, field mappings, permissions, error alerts and acceptance tests. The published enquiry follow-up package describes two supported tools, one trigger and up to five agreed actions; AI assistants and custom connectors are not included automatically.

Confirm feasibility, account plans, API/message/model charges, approved usage caps, data-processing roles and tool branding before payment. Use representative authorised test data. Agree where human review is required, which actions are prohibited, and who monitors the system after handover. Do not permit payments, production deletion, mass messages or consequential automated decisions without specific controls and approval.

Test normal and exception flows, duplicates, retry limits, field validation, failure alerts and rollback. For assistants, agree sources, coverage, fallback, human handoff and test tolerances; a demonstration does not prove every future answer correct. Supply operating instructions and configuration exports where supported. State the correction window and maintenance responsibilities. Vendor changes may need a new scope, but do not excuse a Provider implementation defect.

Changes, acceptance and exit

Use one authorised approver for consolidated feedback. Correct agreed-scope defects at no additional charge; new direction or volume requires written approval of cost and timing. Define the review period and support window above. Silence is not automatic acceptance. Public release or consequential system changes require explicit authorisation.

Apply the completed MSA's correction, cancellation and refund terms. Allocate completed and undelivered value before payment; an advance is not automatically forfeited. Provider-undelivered work does not expire merely because a billing period ends. Document customer dependencies and a recovery plan. Ordinary agreed handover is included; extra transition work needs an approved estimate. A fixed project does not become a subscription without agreement.

Approval

MSA reference and approved departures: [identify]. Proposed terms selected: [complete]. Provider authorised signatory: [name, title, signature, date]. Customer authorised signatory: [name, title, signature, date]. Both parties receive all completed documents before signature.