



# CUSTOMER SUPPORT

## PROPOSAL + SCOPE OF WORK TEMPLATE

### How to use this template

Customize every section before sending it to a client. Remove anything that does not apply, add specifics, and make deliverables measurable. This is a scope-planning template, not legal advice or a substitute for a signed service agreement.

### 1. CLIENT & PROJECT DETAILS

|                             |                               |
|-----------------------------|-------------------------------|
| <b>Client / Company</b>     | [Client Name]                 |
| <b>Primary Contact</b>      | [Name / Role]                 |
| <b>Project / Engagement</b> | [Customer Support Services]   |
| <b>Prepared By</b>          | [Your Name / Business]        |
| <b>Proposed Start Date</b>  | [Date]                        |
| <b>Engagement Term</b>      | [Project / Monthly / Ongoing] |
| <b>Proposal Valid Until</b> | [Date]                        |

### 2. EXECUTIVE SUMMARY

Provide consistent, professional customer support across agreed channels while following response standards, escalation rules, and approved policies.

#### Client context / current challenge:

[Summarize the client's current situation, problem, bottleneck, or opportunity in 2-4 sentences.]

#### Recommended outcome:

[State the practical outcome this engagement is intended to support. Avoid guaranteeing results you do not control.]

### 3. SCOPE OF SERVICES

Select, remove, or rewrite deliverables so the final scope matches what was agreed during the discovery call.

- ☐ Respond to customer inquiries through agreed support channels
- ☐ Ticket triage, categorization, and prioritization
- ☐ Use of approved templates, FAQs, and knowledge-base resources
- ☐ Order, account, refund, or service assistance within authorized limits
- ☐ Escalation of issues that require manager, technical, billing, or clinical/legal attention

- ☐ Documentation of recurring issues and customer feedback
- ☐ Support inbox / help-desk organization
- ☐ Regular reporting on support volume, recurring issues, and escalations

#### 4. DELIVERABLES & CADENCE

| Deliverable   | Quantity / Frequency          | Turnaround / Due Date | Approval / Owner      |
|---------------|-------------------------------|-----------------------|-----------------------|
| [Deliverable] | [e.g., Weekly / 12 per month] | [Timeline]            | [Client / Freelancer] |
| [Deliverable] | [e.g., Weekly / 12 per month] | [Timeline]            | [Client / Freelancer] |
| [Deliverable] | [e.g., Weekly / 12 per month] | [Timeline]            | [Client / Freelancer] |
| [Deliverable] | [e.g., Weekly / 12 per month] | [Timeline]            | [Client / Freelancer] |
| [Deliverable] | [e.g., Weekly / 12 per month] | [Timeline]            | [Client / Freelancer] |

#### 5. CLIENT RESPONSIBILITIES

- ☐ Provide accurate information, brand assets, credentials, and materials required to perform the work.
- ☐ Provide feedback and approvals within the agreed review window.
- ☐ Maintain valid subscriptions, ad spend, platform fees, licenses, hosting, or third-party tools required for delivery.
- ☐ Provide timely access to relevant decision makers and internal stakeholders.
- ☐ Notify the freelancer promptly about changes in priorities, promotions, pricing, policies, products, or business constraints that affect the work.

#### 6. FREELANCER / SERVICE PROVIDER RESPONSIBILITIES

- ☐ Deliver the agreed scope professionally and within the defined timeline, subject to client dependencies.
- ☐ Communicate blockers, risks, missing inputs, and timeline impacts promptly.
- ☐ Use client information, credentials, and systems only for authorized work.
- ☐ Maintain organized files, project records, and status updates appropriate to the engagement.
- ☐ Request approval before performing material work outside the agreed scope.

#### 7. EXCLUSIONS / OUT OF SCOPE

Unless added through a written change request, the following are not included:

- Refunds, credits, or commitments beyond authorized limits
- Clinical, legal, financial, or technical advice outside approved scripts
- 24/7 coverage unless contracted
- Changes to company policies
- Guaranteed customer satisfaction scores

Additional exclusions: [Add anything discussed with the client.]

#### 8. TIMELINE & MILESTONES

|                            |        |
|----------------------------|--------|
| <b>Kickoff</b>             | [Date] |
| <b>Client Inputs Due</b>   | [Date] |
| <b>First Deliverable /</b> | [Date] |

|                                    |                         |
|------------------------------------|-------------------------|
| <b>Milestone</b>                   |                         |
| <b>Review Window</b>               | [e.g., 2 business days] |
| <b>Target Completion / Renewal</b> | [Date]                  |

## 9. COMMUNICATION & WORKING AGREEMENT

|                                 |                                             |
|---------------------------------|---------------------------------------------|
| <b>Primary Channel</b>          | [Email / Slack / GHL / Teams / Other]       |
| <b>Project Management</b>       | [Notion / ClickUp / Trello / Asana / Other] |
| <b>Update Frequency</b>         | [Weekly / Twice weekly / As needed]         |
| <b>Core Availability</b>        | [Days / time zone / overlap hours]          |
| <b>Expected Response Window</b> | [e.g., within 1 business day]               |
| <b>Approver</b>                 | [Client / Manager / Team Lead]              |

## 10. REVISIONS & CHANGE REQUESTS

Included revision rounds: [Number or policy]

A revision means an adjustment to work that remains within the approved brief and scope. New deliverables, new platforms, major changes in direction, additional pages/campaigns/assets, or work requested after approval may be treated as additional scope.

Change request process: [Describe how additional work will be quoted, approved, and scheduled.]

## 11. FEES & PAYMENT TERMS

|                                  |                                           |
|----------------------------------|-------------------------------------------|
| <b>Service Fee</b>               | [Amount / Currency]                       |
| <b>Billing Structure</b>         | [Hourly / Project / Retainer / Milestone] |
| <b>Deposit / Upfront Payment</b> | [Amount / % if applicable]                |
| <b>Invoice Schedule</b>          | [Weekly / Monthly / Milestone]            |
| <b>Payment Due</b>               | [e.g., Upon receipt / Net 7]              |
| <b>Additional Work Rate</b>      | [Rate / Quote separately]                 |

Note: Insert taxes, transaction fees, late-payment terms, cancellation terms, and refund terms only if they are part of your actual agreement and appropriate to your jurisdiction.

## 12. SUCCESS MEASURES

Track only metrics that make sense for the engagement and that you can reliably observe.

- ☐ First response time
- ☐ Resolution time
- ☐ Tickets handled
- ☐ Escalation rate
- ☐ CSAT where available
- ☐ Backlog size / aging

Client-specific success criteria: [Add agreed targets, quality standards, milestones, or service levels.]

## 13. ASSUMPTIONS & DEPENDENCIES

- Timelines assume the client provides required assets, access, approvals, and feedback on time.
- Third-party outages, platform restrictions, policy changes, account limitations, and approval delays may affect delivery.

- Results influenced by market conditions, offer quality, pricing, sales process, traffic, budget, platform algorithms, or client execution are not guaranteed.
- Any work that materially changes the assumptions above should be reviewed before proceeding.

#### 14. ACCEPTANCE / NEXT STEP

If this scope reflects the agreed engagement, the next step is to finalize the service agreement, payment arrangements, onboarding requirements, and kickoff schedule.

|                             |                                         |
|-----------------------------|-----------------------------------------|
| <b>Client Name</b>          | [Name]                                  |
| <b>Approval / Signature</b> | [Signature or written approval]         |
| <b>Date</b>                 | [Date]                                  |
| <b>Next Step</b>            | [Contract / Invoice / Intake / Kickoff] |

#### BONUS: SCOPE CONFIRMATION CHECKLIST

- ☐ The client problem and desired outcome are clearly stated.
- ☐ Every deliverable has a quantity, frequency, or definition where possible.
- ☐ Responsibilities are separated between client and freelancer.
- ☐ Out-of-scope work is explicit.
- ☐ Timeline depends on clearly stated client inputs and approvals.
- ☐ Revision rules and change-request process are defined.
- ☐ Fees and billing structure are clear.
- ☐ Success metrics are realistic and measurable.
- ☐ No guarantee is made for outcomes outside the freelancer's control.
- ☐ The final scope matches what was discussed during the discovery call.