



EXECUTIVE VA

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

Client / Company	[Client Name]
Primary Contact	[Name / Role]
Project / Engagement	[Executive VA Services]
Prepared By	[Your Name / Business]
Proposed Start Date	[Date]
Engagement Term	[Project / Monthly / Ongoing]
Proposal Valid Until	[Date]

2. EXECUTIVE SUMMARY

Protect executive focus by managing priorities, communication, scheduling, follow-through, and administrative coordination with a high level of discretion.

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.

- ☐ Complex calendar management and scheduling rules
- ☐ Inbox triage, prioritization, drafting, and follow-up support
- ☐ Meeting agenda preparation, note capture, and action-item tracking
- ☐ Travel planning, itinerary coordination, and logistics support
- ☐ Executive task and priority tracking

- ☐ Stakeholder coordination with team members, vendors, clients, or partners
- ☐ Preparation and organization of documents, presentations, and briefing materials
- ☐ Confidential administrative support within agreed access boundaries

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:

- Making material business decisions without authorization
- Signing contracts or commitments without authority
- Handling regulated legal, financial, or HR decisions unless explicitly authorized
- Personal errands unless included in scope
- Unrestricted access to sensitive systems without client approval

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

8. TIMELINE & MILESTONES

Kickoff	[Date]
Client Inputs Due	[Date]
First Deliverable /	[Date]

Milestone	
Review Window	[e.g., 2 business days]
Target Completion / Renewal	[Date]

9. COMMUNICATION & WORKING AGREEMENT

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

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

- ☐ Calendar conflicts reduced
- ☐ Executive follow-through rate
- ☐ Meeting action items completed
- ☐ Inbox response / triage efficiency
- ☐ Executive time reclaimed

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.

Client Name	[Name]
Approval / Signature	[Signature or written approval]
Date	[Date]
Next Step	[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.