
CA Solutions LLC

AI Agents · Web & Software · Workflow & CRM Automation · Secure RAG & Knowledge Systems · Communications Automation

Statement of Work

Project-specific ordering document issued under the Master Services Agreement

Document Version: 1.0 | **Template Effective Date:** June 2, 2026

Prepared for: CA Solutions LLC

Governing Law: State of Wyoming, United States

Markets Covered: United States & Canada

This Statement of Work (“SOW”) is issued under, incorporates, and is governed by the Master Services Agreement (“MSA”) between CA Solutions LLC and the Client identified below. Capitalized terms not defined here have the meanings in the MSA. If this SOW conflicts with the MSA, the MSA controls except where this SOW expressly references and modifies a specific MSA section.

1. SOW Metadata

SOW Number	[SOW-YYYY-###]
SOW Effective Date	[DATE]
Related MSA	MSA dated [DATE] between CA Solutions LLC and [CLIENT LEGAL NAME]
Client Legal Name	[CLIENT LEGAL NAME]
Client Address	[CLIENT ADDRESS]
CA Solutions Contact	[NAME, TITLE] · info@ca-solutions.group · +1 (716) 347-9866
Client Project Sponsor	[NAME, TITLE, EMAIL]
Project Manager	[NAME, TITLE, EMAIL]
Selected Package / Plan	[PACKAGE TIER 1 / 2 / 3] + Monthly Maintenance & Support

2. Project Background

[Describe the Client current situation, systems, and the business context prompting this engagement.]

3. Business Objectives

[List the measurable business objectives this project is intended to support (e.g., reduce manual handling, centralize CRM data, deploy a support chatbot).]

4. Project Summary

[Provide a concise summary of the Services and Deliverables covered by this SOW.]

5. Definitions Specific to This SOW

[Define any terms unique to this engagement. Otherwise, MSA definitions apply.]

6. Scope of Services

The following Services are in scope. Strike or mark “N/A” any item not applicable to this engagement.

6.1 Discovery and Workflow Audit

[Scope of discovery sessions and workflow audit.]

6.2 Technical Blueprint

[Architecture and blueprint deliverable. See Attachment 1.]

6.3 Web Design or Web Application Work

[Pages, features, CMS, hosting coordination.]

6.4 AI Agent or Chatbot Work

[Agent/chatbot use case, channels, and behavior. See Section 12.]

6.5 RAG or Knowledge Base Work

[Knowledge sources, ingestion, and retrieval configuration.]

6.6 CRM Automation Work

[CRM platform, objects, pipelines, and automations.]

6.7 Email, SMS, or WhatsApp Automation Work

[Channels and message flows. Subject to Section 14 and the SMS/WhatsApp Consent Capture Processes.]

6.8 Custom Software, Portal, or Dashboard Work

[Custom application scope and features.]

6.9 Integrations

[Systems to be integrated and integration method.]

6.10 Testing

[Testing approach and responsibilities. See Section 17.]

6.11 Deployment

[Deployment targets and process.]

6.12 Training

[Training sessions and materials. See Section 21.]

6.13 Support

Monthly maintenance and support per the selected plan. See Section 20.

7. Deliverables

#	Deliverable	Description	Owner	Format	Delivery / Milestone	Acceptance Criteria
1	[Name]	[Description]	[CA / Client]	[Format]	[Date / Milestone]	[Criteria]
2	[Name]	[Description]	[CA / Client]	[Format]	[Date / Milestone]	[Criteria]
3	[Name]	[Description]	[CA / Client]	[Format]	[Date / Milestone]	[Criteria]

Deliverables are subject to the delivery, review, and acceptance process in MSA Section 17.

8. Out-of-Scope Items

The following are expressly out of scope and require a Change Order: [List, e.g., content writing, paid-ad management, additional integrations, data cleansing, penetration testing, legal review.]

9. Project Assumptions

Fees and timelines assume: [List assumptions, e.g., timely access, single environment, defined number of revisions, availability of Client SMEs.] Material changes to these assumptions may require a Change Order.

10. Client Dependencies

Access Credentials	[Systems and access required]
API Keys	[Keys/tokens Client will provide]
Platform Licenses	[Licenses Client must hold]
Content and Branding	[Copy, images, brand assets]

Data Sources	[Data Client will provide]
Legal Review	Client's counsel review of consent language, disclosures, and policies
Consent Language	Client-approved consent and disclosure text
Subject-Matter Review	Client SME review of outputs and configurations

11. Technical Architecture

System Overview: [Describe components and how they connect.]

Data Flow: See Attachment 2 (Data Flow Map).

Integration Points: [List integrations.]

Hosting Environment: [Where hosted.]

Authentication and Access: [Auth model and roles.]

Logging and Monitoring: [What is logged and monitored.]

Backup / Rollback: [Backup and rollback requirements.]

12. AI-Specific Scope

AI Use Case	[Describe]
Model or Provider	[e.g., provider/model]
Prompting / System Instructions	[Approach]
Retrieval Sources	[Approved sources]
Guardrails	[Input/output filtering, restrictions]
Human Review Requirements	[Where human review is required]
AI Disclosure Requirements	[Disclosures to end users]
Prohibited AI Uses	Consequential decisions per MSA Section 10.6; [others]
Testing Requirements	[AI test plan]
Known AI Limitations	Probabilistic outputs; potential inaccuracy/bias; no guarantee of accuracy

13. Data Protection Scope

Categories of Personal Information	[e.g., contact data, account data]
Sensitive / Regulated Data	[None unless authorized here]
Data Sources	[Where data originates]
Data Retention	[Retention periods/instructions]
Subprocessors	[Relevant subprocessors; see DPA Exhibit C]
International Transfers	[US/Canada; mechanisms per DPA]
Security Controls	Per MSA Exhibit A and the DPA
Deletion / Return Requirements	[On termination per DPA]

14. Communications Compliance Scope

Email Program	[Scope; CAN-SPAM / CASL]
SMS Program	[Scope; TCPA / state / CTIA / carrier / CASL]
WhatsApp Program	[Scope; WhatsApp Business Policy / Meta terms]
Consent Capture Location	[Forms/flows; see Attachment 4]
Consent Records	Per the SMS/WhatsApp Consent Capture Processes
Message Templates	See Attachment 3
Opt-Out Handling	Honor opt-outs by any reasonable means; suppression sync
Suppression List Ownership	[Client / shared]
Platform Approval Dependencies	[e.g., 10DLC/brand registration, WhatsApp template approval]

15. Milestones and Timeline

Phase	Description	Target Dates	Payment Trigger
1 — Discovery	[Discovery & audit]	[Dates]	[e.g., Deposit]
2 — Blueprint & Scope	[Technical blueprint]	[Dates]	[Milestone]
3 — Build Sprints	[Implementation]	[Dates]	[Milestone]

4 — Testing	[QA & UAT]	[Dates]	[Milestone]
5 — Launch	[Deployment]	[Dates]	[Milestone]
6 — Post-Launch Optimization	[Tuning & handover to support]	[Dates]	[Final / recurring]

Dates are estimates dependent on Client cooperation, approvals, third-party availability, and payment.

16. Project Governance

Meeting Cadence: [e.g., weekly standups]. **Reporting:** [status reports]. **Decision Rights:** [approvers]. **Escalation Path:** PM → Sponsor → executives. **Issue Management:** tracked in [tool].

17. Acceptance Testing

Test Plan: Attachment 5. **Client Review Period:** [NUMBER] business days per Deliverable. **Acceptance / Rejection:** per MSA Section 17. **Remediation:** CA Solutions corrects material nonconformities and re-delivers. **Production Approval:** Client approves launch in writing.

18. Fees and Payment Schedule

One-Time Package / Fixed Fees	[\$AMOUNT]
Hourly Fees (out-of-scope / T&M)	[\$RATE / HOUR]
Recurring Monthly Maintenance & Support	[\$AMOUNT / MONTH]
Usage Fees	[AI/API/messaging usage – at cost or per schedule]
Third-Party Costs	[Hosting, licenses, messaging – pass-through]
Taxes	Client responsible for applicable taxes
Payment Milestones	[e.g., 50% deposit, 25% at build, 25% at launch]

Invoices are due [on receipt / NET 15 / NET 30]. Recurring Fees are billed in advance each cycle.

19. Change Control

Changes to this SOW are handled through the Change Order process in MSA Section 7 using the CA Solutions Change Order Form.

20. Support and Maintenance

Support and maintenance are provided under the selected monthly plan, including the channels, hours, severity levels, and response targets stated in MSA Exhibit C / the plan.

21. Training and Documentation

CA Solutions will provide **[NUMBER]** training session(s) and the Documentation described in the Deliverables table.

22. Security Requirements

CA Solutions will apply the security measures in MSA Exhibit A and the DPA for systems within its control. Client is responsible for the security of its own systems and credentials.

23. Compliance Responsibilities

Client is responsible for legal compliance applicable to its business, data, and communications programs, including privacy (U.S. state laws, PIPEDA, Quebec Law 25 where applicable), communications (TCPA/FCC/CTIA/CAN-SPAM/CASL), accessibility, and sector-specific rules. CA Solutions implements compliance-supporting features only within this scope.

24. Intellectual Property Treatment

Intellectual property is treated as in MSA Section 13. Any deviation for this engagement: **[None / describe]**.

25. Term and Termination

This SOW begins on the SOW Effective Date and continues until the Deliverables are accepted and the recurring plan is terminated under MSA Section 23. SOW Term: **[describe]**.

26. SOW-Specific Warranties and Disclaimers

The warranties and disclaimers in MSA Section 19 apply. Any SOW-specific additions: **[None / describe]**.

27. SOW-Specific Limitations

The limitations in MSA Section 20 apply, including the liability cap. SOW-specific limitations: **[None / describe]**.

28. Special Terms

[Any special commercial or legal terms unique to this engagement.]

29. Attachments

#	Attachment
1	Technical Blueprint
2	Data Flow Map
3	Message Templates
4	Consent Screens
5	Acceptance Test Plan

30. Signature Blocks

The parties execute this SOW as of the SOW Effective Date, under and subject to the MSA.

CA SOLUTIONS LLC

[CLIENT LEGAL NAME]

Signature

Signature

Name

Name

Title

Title

Date

Date