



# 15 service firm job templates: the steps and the hours

Real templates for accounting and audit, creative agencies, law practices, engineering consultancies and IT services. Every step sized in man-hours, with the review gates and the waits that decide whether a deadline holds.

**Stasis** by Clavis Data · [stasis.clavis-data.com](https://stasis.clavis-data.com)

## What this is

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Fifteen real job templates, one for each of the ways service firms actually deliver work. Every template lists the steps a job breaks into, the man-hour estimate a mid-size firm would put against each step, and the points where the work simply waits on someone else. The numbers are realistic starting points in 15-minute granularity. Treat them as a baseline to adapt, not gospel.

You can copy these straight into a proposal, a project plan, or a capacity model. They cover accounting and audit, creative agencies, law practices, engineering consultancies, and IT services.

## Why estimating in hours matters

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A job is not a due date. It is a chain of steps, each one a certain size in hours, some of them waiting on a client, an authority, or a vendor. The due date is just the last thing that happens.

Across service firms the estimate tends to live in one place, a head or a proposal, and the plan lives in another, a calendar or a spreadsheet nobody trusts by Wednesday. When the two never meet, weeks fill up quietly and a deadline slips before anyone can see it coming. Sizing every step in hours is what connects them. Once you know the size of the work, you can look at a person's week and answer the only question that matters: does it fit. If it does, you can promise a date and keep it. If it does not, you find out now, while you can still move something, instead of the day before delivery.

## How to read each template

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- **Hours** are hands-on man-hours for that step. 1.5h is ninety minutes, 45m is forty-five.
- **Review gate** marks the one step where a senior person checks the work before it reaches the client.
- **Waits** are steps where nobody on the team is working. The clock runs on someone outside the firm, so the hands-on time is zero but the calendar keeps moving. Real schedules live or slip on these.
- **Hands-on total** is the sum of the work steps, the number you would bill or resource against.

## Accounting and audit

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*Month-ends, filings, and audits that repeat like clockwork.*

### Monthly close and management accounts

Bank recs to a reviewed management pack. **Hands-on total: 13.25h.**

- |   |                                 |                  |
|---|---------------------------------|------------------|
| 1 | Bank and ledger reconciliations | 4h               |
| 2 | Adjusting journals and accruals | 3h               |
| 3 | Draft management pack           | 4h               |
| 4 | Manager review                  | 1.5h review gate |
| 5 | Finalize and send to client     | 45m              |

### Corporate tax filing

Computation, client sign-off, submission. **Hands-on total: 9h.** Calendar waits: 8 days.

- 1 Gather schedules from client waits 5 days
- 2 Tax computation 6h
- 3 Partner review 2h review gate
- 4 Client sign-off waits 3 days
- 5 Submit and archive 1h

## Audit engagement

Planning, fieldwork, completion. **Hands-on total: 29h.** Calendar waits: 7 days.

- 1 Planning and risk assessment 5h
- 2 Client PBC list returned waits 7 days
- 3 Fieldwork and testing 16h
- 4 Completion and file assembly 5h
- 5 Partner review and sign-off 3h review gate

## Creative agency

*Campaigns, builds, and retainers that live on client feedback.*

### Campaign launch

Brief to a live campaign, with a client approval gate. **Hands-on total: 20.5h.** Calendar waits: 4 days.

- 1 Brief and creative concepts 5h
- 2 Design and copy production 10h
- 3 Creative director review 1.5h review gate
- 4 Client approval on creative waits 4 days
- 5 Build assets and launch 4h

### Website build

Wireframes through launch, waiting on client content. **Hands-on total: 31h.** Calendar waits: 6 days.

- 1 Wireframes and site map 6h
- 2 Visual design 8h
- 3 Client supplies copy and images waits 6 days
- 4 Build and integrate 12h
- 5 QA and cross-browser review 3h review gate
- 6 Deploy and hand over 2h

### Monthly retainer

A repeatable cycle of planning, production, and reporting. **Hands-on total: 14h.**

- 1 Plan the month's content 2h
- 2 Produce and schedule posts 8h
- 3 Account manager review 1.5h review gate
- 4 Report on last month's results 2.5h

## Law practice

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*Reviews, diligence, and filings where every deadline is real.*

### Contract review

Read, mark up, and issue a reviewed advice note. **Hands-on total: 9.25h.**

- 1 Read and mark up the contract 4h
- 2 Draft advice note 3h
- 3 Partner review 1.5h review gate
- 4 Issue advice to client 45m

### Due diligence

Data room review to a reviewed diligence report. **Hands-on total: 24.5h.** Calendar waits: 5 days.

- 1 Data room access opened waits 5 days
- 2 Review documents and flag issues 15h
- 3 Draft diligence report 6h
- 4 Partner review 2.5h review gate
- 5 Deliver report to client 1h

### Dispute filing

Draft pleadings, get sign-off, file with the court. **Hands-on total: 16.5h.** Calendar waits: 3 days.

- 1 Gather facts and evidence 5h
- 2 Draft pleadings 8h
- 3 Partner review 2h review gate
- 4 Client sign-off waits 3 days
- 5 File with the court 1.5h

## Engineering consultancy

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*Assessments, designs, and tenders paced by site access and approvals.*

### Site assessment

Visit, assess, and issue a reviewed findings report. **Hands-on total: 14h.** Calendar waits: 4 days.

1 Site access arranged waits 4 days

2 Site survey and measurements 5h

3 Assess and draft findings 6h

4 Lead engineer review 2h review gate

5 Issue findings report 1h

## Detailed design

Concept through a checked, issued drawing set. **Hands-on total: 28.5h.**

1 Concept design 6h

2 Detailed calculations 8h

3 Produce drawing set 10h

4 Design check and review 3h review gate

5 Issue for construction 1.5h

## Tender package

Assemble, review, and issue documents, then wait on bids. **Hands-on total: 19h.** Calendar waits: 7 days.

1 Draft specifications and BoQ 7h

2 Assemble tender documents 5h

3 Partner review 2h review gate

4 Issue tender to bidders 1h

5 Bidders return submissions waits 7 days

6 Evaluate and recommend 4h

## IT services

*Onboarding, migrations, and maintenance that keep clients running.*

### Client onboarding

Discovery to a documented, handed-over setup. **Hands-on total: 16.5h.** Calendar waits: 3 days.

1 Discovery and inventory 4h

2 Client provides access and credentials waits 3 days

3 Configure tools and monitoring 7h

4 Document the environment 3h

5 Lead engineer review 1.5h review gate

6 Handover call with client 1h

### Infrastructure migration

Plan, migrate, and validate, then wait on the cutover window. **Hands-on total: 22h.** Calendar waits: 5 days.

- 1 Migration plan and runbook 6h
- 2 Change review and approval 2h review gate
- 3 Approved cutover window waits 5 days
- 4 Execute the migration 10h
- 5 Validate and monitor 4h

## Monthly maintenance

A repeatable cycle of patching, checks, and a client report. **Hands-on total: 10h.**

- 1 Apply patches and updates 4h
- 2 Health checks and backups 3h
- 3 Lead engineer review 1h review gate
- 4 Client report 2h

## Turn these estimates into a plan that runs itself

Estimates like these are the raw material. What they cannot do on a page is meet the reality of who is free next Tuesday. That is the part Stasis handles. Give it a work model once, hand it man-hour estimates like the ones above, and it builds a clock-time daily timetable for each person, respects the waits, and refuses to overbook anyone. When something moves, the work reflows in time on its own, and it only asks a manager to decide when something genuinely will not fit.

Take any template here as a starting point and see your own week hold together at **[stasis.clavis-data.com](https://stasis.clavis-data.com)**.

### Want these to build the schedule for you?

Stasis takes templates like these, turns the man-hours into an hour by hour daily plan for every person, and rebuilds the plan automatically when a client is late or someone takes leave. It will not overbook anyone. When work genuinely cannot fit, it asks you to decide.

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