The right order, step 1: frame

THE SCOPING CHECKLIST

What gets decided, in what order, and what you have at the end.

01 Who decides, and what for

- ☐ The goal of the first release, in one sentence, and the date that matters.
- ☐ The decision maker: the person who settles it when two teams disagree.
- ☐ The internal lead: the person who will run Salesforce after the project.
- ☐ The budget in mind, even as a range.

02 What exists today

- ☐ Each process in scope, written as it runs today, with who runs it.
- ☐ What gets stuck in each, in the words of the people who do it.
- ☐ The differences between teams or countries, named: keep them or align them.
- ☐ The data to bring over, where it comes from, and its known quality.
- ☐ The systems to connect, which way the data flows, and how often.

03 What gets built first

- ☐ Each process ranked: first release, second release or later, with the reason.
- ☐ The users of the first release: roles, numbers, countries, languages.
- ☐ What is out of scope, written down.
- ☐ The acceptance criteria of the first release.
- ☐ The decisions still open: the question, the options, who decides, by when.

04 What the integrator receives

- ☐ The scope of the first release, to attach to the tender as is.
- ☐ The assumptions and constraints: licences, timeline, security.
- ☐ A pricing grid: one line per item, the same columns for everyone.
- ☐ What every answer must contain: the filled grid, the team, the plan, the assumptions.

What you have at the end

- ☑ The scope of the first release, ready for the tender.
- ☑ The order of work: what goes first, what waits, and why.
- ☑ A pricing grid: the quotes compare line by line.

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To fill it in with me in two weeks:
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