CANIDIUM

SCOPE OF WORK Checklist

WHAT TO DISCUSS

Project Overview

- ◯ Project Objectives: Clearly define the goals and objectives of the project.
- ◯ Scope Boundaries: Outline the boundaries and limitations of the project scope.

Business Requirements

- ◯ Functional Requirements: Clearly state the specific functionalities required in the software.
- ◯ Non-functional Requirements: Address performance, security, scalability, and other non-functional aspects.

Timeline and Milestones

- ◯ Project Timeline: Establish a realistic timeline for the project from initiation to completion.
- ◯ Milestones: Identify key project milestones and deadlines.

Budget and Resources

- ◯ Budget Constraints: Clearly communicate budget limitations and constraints.
- ◯ Resource Allocation: Define the roles and responsibilities of both client and partner teams.

Technical Infrastructure

- Existing Systems: Provide details about any existing systems the new software needs to integrate with.
- Technical Requirements: Specify any specific technical requirements or constraints.

Regulatory Compliance and Standards

- Compliance Requirements: Ensure that the software adheres to industry-specific regulations and compliance standards.
- Data Security: Discuss measures for data security and privacy.

User Acceptance Criteria

- Definition of Success: Clearly define what success looks like for the end-users and stakeholders.
- Testing and Validation: Discuss the criteria for acceptance testing and validation.

Communication Plan

- Stakeholder Communication: Establish a plan for regular communication with stakeholders.
- Issue Resolution: Define the process for identifying and resolving project issues.

Change Management

- Change Requests: Discuss how changes to the scope will be handled.
- Approval Process: Define the process for approving changes to the project.

Documentation and Deliverables

- Required Documentation: Specify the documentation expected from the software implementation partner.
- Deliverables: Clearly outline the expected deliverables at each project phase.

Risk Management

- Risk Assessment: Identify potential risks and discuss strategies for risk mitigation.
- Contingency Plans: Establish contingency plans for unforeseen challenges.

Training and Support

- User Training: Discuss the training requirements for end-users.
- Post-Implementation Support: Define the support and maintenance plan after the software is live.

Legal and Contractual Considerations

- Contract Review: Ensure all contractual terms are understood and agreed upon.
- Intellectual Property: Clarify ownership and usage rights of intellectual property.

Questions and Clarifications

- Open Forum: Provide an opportunity for the software implementation partner to ask questions and seek clarifications.
- Expectations Alignment: Ensure both parties have a shared understanding of the project's goals and requirements.

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WHAT TO BRING

- Business Requirements Document (BRD):
  - Clearly outlines the business objectives, goals, and requirements of the project.
  - Defines the functional and non-functional requirements of the software.
- Functional Specifications:
  - Details the specific functionalities and features expected in the software.
  - Describes how the software will meet the business requirements.
- Technical Specifications:
  - Provides information about the technical aspects of the project.
  - Includes details about the technology stack, integration requirements, and any technical constraints.
- Request for Proposal (RFP) or Request for Information (RFI):
  - If applicable, provide the original RFP or RFI documents that were used to solicit proposals from potential partners.
  - Includes details about the organization's needs, expectations, and evaluation criteria.
- Project Timeline and Milestones:
  - Presents a detailed project timeline with key milestones and deadlines.
  - Helps the software implementation partner understand the expected duration of the project.

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WHAT TO BRING

- Budget Information:
  - Clearly states the budget constraints and financial considerations.
  - May include information on payment schedules, cost breakdowns, and any potential variations.
- Existing System Documentation:
  - Offers insights into any existing systems or software that the new implementation needs to integrate with.
  - Provides relevant APIs, data structures, and system architecture information.
- Regulatory Compliance Requirements:
  - Outlines any industry-specific regulations and compliance standards that the software must adhere to.
  - Details any security or privacy requirements.
- Legal and Contractual Documents:
  - Brings copies of the contract or agreement that outlines the terms and conditions of the partnership.
  - Includes any legal considerations, such as intellectual property rights.

WHAT TO DO NEXT

Read more: A Complete Guide to Successful Software Implementation Scoping Calls