Delivery Scoping

Getting a Sales Lead to a delivered Proposal

DocumentID: DELIVERY-SCOPING

This document outlines the process for scoping projects at TribalScale. It serves as a blueprint for delivering proposals to clients, ensuring a standardized approach across all projects. Detailed steps, department-specific tasks, and resources are linked throughout this document for ease of access and update.

# Assumptions Before Starting

* Sales has met with a client and advanced them to the scoping phase.
* Sales has vetted the opportunity
* Scoping has been triggered in HUBSPOT

# Process Overview

The duration of this phase should take no longer than 1 week. This is a transitory phase from the AE to the PM. The PM should drive. Here are the steps to Scope:

## Requirement Gathering Call

* 1. Description: This step involves detailed discussions to gather all project requirements, expectations, and constraints from the client.
  2. Responsible Department: Product Manager.
  3. [DELIVERY-SCOPING-REQUIREMENTS-GATHERING](https://docs.google.com/document/u/0/d/1qOwOb18NoS9Pv5fgmzRRG18KLx5aiaj_w4aRXea-WaE/edit)

## Feasibility Study

* 1. Description: Conduct a feasibility study to evaluate the project's viability, resources required, and potential roadblocks.
  2. Responsible Department: Product Manager
  3. [DELIVERY-SCOPING-FEASIBILITY](https://docs.google.com/document/d/1tp_bPEUBr6EYqMghIdtp5XYuXf2cQETfhDFIlML3IjE/edit?usp=sharing)

## Scoping Estimates

* 1. Based on the gathered requirements and feasibility study, put together a scoping estimate for Design, Engineering
  2. Responsible Department: Project Management
  3. [DELIVERY-SCOPING-ESTIMATION-SHEET](https://docs.google.com/document/d/1ddxDJrP3oILLQs1HR_bL2-usVUonDVhm8AGMuNuXYtk/edit?usp=sharing)

## Project Proposal Creation

* 1. Description: Based on the gathered requirements and feasibility study, create a comprehensive project proposal.
  2. Responsible Department: Project Management, Business Analysis, & Sales
  3. [DELIVERY-SCOPING-PROPOSAL-BUILD](https://docs.google.com/document/d/1ag_35Gs4KpHWuKZVzpgrpdCAiHLlPnLSmtu1D1Pewng/edit#heading=h.d54g3gg2l4j)

## Internal Review

* 1. Description: Conduct an internal review of the project proposal with key stakeholders for feedback and approval.
  2. Responsible Department: Product Manager / AE
  3. [DELIVERY-SCOPING-PROPOSAL-REVIEW](https://docs.google.com/document/u/0/d/13GMfteOi3Kda8hYY19e_U8Gv3M48lcpLC1NIIc00IvU/edit)

## Client Presentation

* 1. Description: Present the proposal to the client, addressing any questions or concerns they may have.
  2. Responsible Department: Sales, Product Management
  3. [DELIVERY-SCOPING-PROPOSAL-PRESENTATION](https://docs.google.com/document/u/0/d/1mHEd3HZXBGHgpqZ_0GGEbsUx97W4DRGSzQB5MqmH7lw/edit)

## Feedback and Finalization

* 1. Description: Gather feedback from the client, make necessary adjustments, and finalize the project scope.
  2. Responsible Department: PM and AE
  3. [DELIVERY-SCOPING-PROPOSAL-FINALIZATION](https://docs.google.com/document/u/0/d/1Mleqv92_aHx1xjFVB1quYFih3LOcmyEGV3F0yJxyiDk/edit)

# Next Phases:

* Sales comes to terms with the client