

[Client]: [Project]: Tech scope

1. Project Overview

Project Summary

[Two/three sentence summary]

Date Created

[Date]

2. Stakeholders

[Client representatives (e.g., CEO, Operations Manager, etc.) and internal team leads.]

3. Current Situation

Process mapping

Description of the current manual process or system.

Time, effort, and cost currently involved.

Pain Points

Key inefficiencies, bottlenecks, or challenges identified.

Existing Tools & Systems

List of tools, software, or platforms used (e.g., CRM, ERP, Excel).

4. Proposed Solution

Automation Scope

Processes or workflows targeted for automation (e.g., FAQ chatbot, automated quote generation).

High-Level Workflow

Outline of the proposed workflow with visuals (flowchart, process map, etc.).

Tech stack

Tools and platforms involved (e.g., MyZone AI chatbots, Make.com, APIs, etc.).

Data Sources

Identify all inputs (e.g., databases, forms, APIs).

Automation Outputs

What the automation delivers (e.g., reports, emails, chatbot responses).

Integration Points

List systems that require integration.

Security Considerations

Data protection and compliance requirements.

Scalability

Can the automation handle increased volumes or additional features?

Risks

Example: "Integration with CRM may encounter API limits."

Assumptions & requirements

Example: "Client provides timely access to systems and data."

5. Project Plan

Timeline & Milestones

Phases with start and end dates (e.g., Discovery: 1 week, Development: 2 weeks).

Deliverable checkpoints (e.g., Workflow approval, Prototype review).

NOTE: This timeline does not include any periods waiting on confirmations/data access/etc from client.

Budgets

Setup hours (e.g. 40 h @ \$200/h)

Subscription & licensing costs

Total project cost

ROI Analysis

Here, we should scope how much does the current process cost for the client. And along with the project cost, do the ROI analysis to justify the project's feasibility.

(example for the Budget/ROI section)

Budgets

- Development hours: 83 hours @ \$200/hour = \$16,600
- Subscription costs:
 - N8n or make.com: ~\$29-50/month
 - OpenAI API: ~\$50/month
 - Apify (if not self hosted): ~\$70/month
- User training/communication : 4 hours
- Project Management: 8 hours
- Total setup cost: \$16,600
- Monthly operating cost: ~\$150

NOTE: Hours cost are rated in CAD, while subscription costs are rated in USD

ROI Analysis Current Process Cost:

- Ulric's time: 60 hours/month × 12 months × \$50/hour = \$36,000/year (conservative estimate)
- Higher-end estimate: 90 hours/month × 12 months × \$50/hour = \$54,000/year
- Error correction and delays: ~\$6,000/year
- **Total annual cost: \$42,000-\$60,000**

Automation Benefits:

- Time savings: \$32,400-\$48,600/year (90% reduction)
- Error reduction: \$5,400/year
- Faster broker response time value: ~\$5,000/year
- **Total annual savings: \$42,800-\$59,000**

ROI: 231-404% in first year, ongoing savings of \$42,800-\$59,000 annually

(example ends)

NOTE: These success metrics are based on initial estimates and assumptions and may be refined as implementation progresses.

Approval workflow

Written confirmation via email suffices for approval of this plan.

8. Appendices

Any additional documentation or references (e.g., meeting notes, API documentation).
[try insert real full links here, research may be needed to confirm documentation]

(Do not include: Template version: 2.7. Last update September 11, 2025)