Software (Web, Application) Scope Outline

*Can also be used to request Vendor Proposals.*

Possible ideas on technology:

* Salesforce
* Masterfile
* Zoho
* SugarCRM
* *Other combination CRM/Project activity tracking software*

Background Information

# BUSINESS INFORMATION on SMITH ECONOMICS

Provide contact information, general notes on teh business and how things are done. Maybe the mission/vision statement. Keep it short and link to online content.

### Guiding Principles

What helps you guide your decisions

### Our Customers (or the Audience)

### Comparable Companies

# CURRENT SYSTEMS and PROCESSES

This is an area where it is helpful to give some structure information about the current systems being used.

## KEY PROCESSES -

Give some information about any key processes that will be affected by this work.

### 0 PROSPECT

### 1 INTAKE - analyst is reviewing

### 2 REVIEW & REPORT - concluded

### 3 DEPOSITION

### 4 TRIAL

### 5 RESOLVED, EXPUNGE

### 6 ARCHIVE

Software Specifications

# FEATURES

Features are aspects of teh system that allow certain functions to happen, or are possibly a design element to the system. Meeting certain standard like accessibility or security are an example of features.

## Current - Needed

* This is what you need

## Proposed - Wanted

* What you want (not yet being done)

# FUNCTIONALITY

List out the specific tasks that you and your staff must be able to perform. This list can be as specific as you want. On the contrary; the more specific the better. This is a great place to identify who can perform which tasks (functionality).

## Current - Needed

* This is what you need

## Proposed - Wanted

* What you want (not yet being done)

# CRM/CASE APP SPRINTS

## SPRINT 0 - Typically FInalize Team and Create Project Plan

*Time to complete:*

Describe the work to be done.

*ESTIMATED COST:*

*STEPS*

1. Determine the scope of work (features, functionality)
2. Product a scope document that can be approved
3. Review technology that would be a suitable fit (test, then demo)
4. Determine technology preference and solicit competitive bids
5. Facilitate meetings with bidding parties
6. Recommend and select a bidding party
7. Outline a schedule of work to complete SPRINT 1 & 2

## SPRINT 1 - Initial Set Up and Possible Migration

*Time to complete:*

Describe the work to be done.

*ESTIMATED COST:*

*STEPS*

1. Determine the scope of work (features, functionality)

## SPRINT 2 - Feature or Functionality Update 1

*Time to complete:*

Describe the work to be done.

*ESTIMATED COST:*

*STEPS*

1. List required Steps

## ADDITIONAL SPRINTS

*Time to complete:*

Describe the work to be done.

*ESTIMATED COST:*

*STEPS FOR EACH SPRINT*

1. Determine the Scope of Work
2. Firm up costs and schedule
3. Assist Stephanie to manage vendor as they conduct changes
4. Review work and ensure proper training and documentation

### SPRINT 3 - Feature or Functionality Update 2

Billing can be as a flat fee or as hourly consultation. Each person is currently responsible for tracking their own time.

### SPRINT 4 - Feature or Functionality Update 3

### SPRINT 5 - Feature or Functionality Update 4

### SPRINT 6 - TBD

# *!NOTES!*