

# Scoping checklist

What we work through before quoting an implementation. Bring what you have — gaps here are normal and are part of what the first session is for.

## The business process

- ☐ Which teams touch the process, and where it starts and ends
- ☐ What is decided by a person and what should be decided by the system
- ☐ The exceptions people actually hit, not the happy path
- ☐ What currently lives in a spreadsheet and why

## The data

- ☐ Where records come from today, and which system is the source of truth
- ☐ Roughly how many records, and how fast that grows
- ☐ Whether history has to come across, and how far back
- ☐ Any external ID you already rely on for matching

## The org, if one exists

- ☐ Which clouds are licensed and which are actually in use
- ☐ Existing customisation: Apex, Flows, managed packages
- ☐ Who has admin rights today
- ☐ Anything that broke recently and has not been explained

## Constraints

- ☐ A date that genuinely matters, and what happens if it slips
- ☐ Security or residency requirements
- ☐ Integrations that must keep working throughout
- ☐ Who signs off, and what they need to see to do it

Typical implementation runs 10–16 weeks from the org read to go-live, with 30 days of warranty afterwards.