

From a vague request to a usable scope

FREE WORKED EXAMPLE | Fictional case | No customer data

Before

"Handle leads automatically and make sure they reach the right person." This leaves the source, timing, ownership and changes unresolved.

After

Project DEMO-LR. Harbor Automation for fictional Cedar Sales. Workflow Lead routing v1.0.0. Timezone Europe/London. One approved web form sends lead_id, email and region to one CRM. Up to 100 submissions per calendar day. Route GB to UK Queue and US to US Queue. Other regions go to Review Queue. Within 5 minutes of webhook receipt, record the lead and its owner queue.

Use immutable lead_id as the duplicate key. Missing lead_id or email goes to the exception log without CRM creation. Replays of an existing lead_id create no second record and do not change its queue. CRM downtime goes to the exception log for manual replay after recovery. No historical imports, enrichment, extra forms, notifications or new CRM are included.

Dependencies and ownership

Cedar CRM administrator owns the sandbox, account permissions and queue identifiers. Cedar Sales Operations owns region rules and daily exception review. Harbor delivery lead owns implementation and pre-acceptance defects. After handover, Cedar automation operator owns monitoring and maintenance. Service fees and ongoing maintenance are separate.

Three acceptance conditions

AC-01: Submit synthetic lead L-001, test@example.invalid, GB once to the approved webhook in the sandbox. Within 5 minutes, one CRM record exists with lead_id L-001 in UK Queue. Reviewer: Cedar Sales Operations. Evidence: timestamped CRM record and webhook receipt.

AC-02: Replay L-001 with unchanged fields. After 5 minutes, the CRM still contains exactly one L-001 record and its queue is unchanged. Reviewer: Cedar CRM administrator. Evidence: count query and run log.

AC-03: Submit L-002 with missing email. Within 5 minutes, one exception entry identifies missing email and no CRM record exists for L-002. Reviewer: Cedar Sales Operations. Evidence: exception entry and zero-result CRM query.

Make the change boundary visible

Fictional worked example continued

A request inside scope

"GB leads went to US Queue. Please fix it." Included: this fails AC-01 on an agreed input. Record a defect against v1.0.0, fix routing and rerun AC-01 to AC-03. Do not charge a new change estimate for an agreed acceptance failure.

A request requiring an estimate

CR-01: "Add a second brand form and enrich every lead." Excluded from the baseline because it adds a source and an enrichment service. Keep v1.0.0 unchanged while clarifying enrichment fields, provider access and retention. Prepare a separate estimate before any work.

Fictional estimate after clarification: 2 hours design, 5 hours build, 2 hours testing, 1 hour documentation = 10 hours. Explicit rate: USD 100/hour. Labor USD 1,000; one-time direct costs USD 0; recurring vendor fees USD 40/month, shown separately. No contingency or margin is added. Scheduling capacity of 5 delivery hours per business day gives 2 workdays after dependencies are ready; this is not a promised calendar completion date.

Cedar sponsor decision: estimate pending; no work authorized. Harbor updates the scope version and acceptance IDs only after the buyer records agreement under its own agreement. New source and enrichment acceptance tests must be written before build.

Use this on your next proposal

Write the single input source and volume cap. Name the destination and observable result. Add an ordinary success, a duplicate and an exception test. Name dependency and maintenance owners. Classify a request in this order: unknown detail = clarify; known breach of an exclusion or bound = change estimate; failure against agreed acceptance = included defect; otherwise compare with the listed included work. Keep uncertain requests pending.

What the complete pack adds

Editable scope and change forms; intake, acceptance and change-impact workbooks; invoice extraction and internal support assistant examples; ten request exercises; a P02 closeout field mapping; and setup instructions. The pack is an operational attachment for your own agreement, not a legal contract or a replacement for discovery.

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