

# Systems Scoping Worksheet

Use this worksheet to prepare an initial conversation. No submission or email sign-up is required. Do not include confidential client records, patient information, credentials or financial-account data.

## ABOUT YOUR ORGANIZATION

- ☐ Company size: number of employees and locations, and approximate annual revenue range.
- ☐ Investment range you are considering for this work (for example under \$50k, \$50k–\$150k, \$150k–\$500k, \$500k+).
- ☐ When do you need results, and is there a deadline or event driving it?

## THE PROBLEM

- ☐ What workflow is slowing the business down?
- ☐ What happens today, from trigger to completion?
- ☐ Who owns each handoff?
- ☐ Which exceptions cause the most repeated work?

## THE CURRENT SYSTEMS

- ☐ List the tools used in the workflow.
- ☐ Which tool is the source of record for each type of information?
- ☐ Who owns the vendor accounts and licences?
- ☐ Are APIs, exports or supported connectors available?
- ☐ Where is information entered twice?

## THE BASELINE

- ☐ Which measure reflects the problem: response time, cycle time, rework, billing preparation or

reporting effort?

- ☐ How is it measured today?
- ☐ What period and sample are representative?
- ☐ What would count as an improvement, and who approves that definition?

## CONSTRAINTS AND CONTROL

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- ☐ Which information is sensitive?
- ☐ Which decisions must stay with a person?
- ☐ Which approvals, legal obligations or security reviews apply?
- ☐ Which deadlines, existing contracts and internal resources matter?

## THE NEXT STEP

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- ☐ State the smallest useful deliverable.
- ☐ Name the person who will test and accept it.
- ☐ Identify dependencies and unanswered questions.
- ☐ Agree what would make the work not worth proceeding with.

This worksheet is a discussion aid, not an audit, quote or guarantee. Scope, price, currency, ownership and support must be agreed in writing.

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Questions or to discuss your answers: buy@conqueror.capital · enterprise.conqueror.capital