PROJECT SPECIFICATION

Business software (ERP, CRM, internal tools)

Replace spreadsheets and scattered tools with software built around your processes.

Fill-in template · English version

Project	
Organisation	
Written by	
Date	
Version	

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How to use this template

- Answer under each question, then delete the questions and sections that do not apply to you.
- Examples in italics are fictitious: they show a useful level of detail. Replace them with your own situation.
- Priorities: M = must have at launch, S = should have, can follow shortly after, C = could have if budget or time allows.
- “Not sure yet” is a useful answer: it tells the provider which points to work out with you.

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01 Your organisation

Help a provider understand, in two minutes, who you are and who you serve.

Organisation name	
Industry	
Countries and cities where you operate	
Current website and social media	
Number of people involved in the project	

QUESTIONS TO ASK YOURSELF

- What do you do, and for whom?
- What sets you apart from your competitors?

Your answers

02 Project background

Explain where the project comes from and why it is starting now.

QUESTIONS TO ASK YOURSELF

- What problem should this project solve?
- What have you already tried, and what did you learn?
- Which processes do you want to equip: sales, stock, purchasing, HR, field operations?
- Which tools do you use today, and where is data entered twice?

> **Example:** *Our quotes are written in a word processor, orders are tracked in a spreadsheet and stock is counted by hand: nobody has the same information at the same time.*

Your answers

03 Goals and success metrics

State what will have changed once the project is delivered, and how you will measure it.

> **Example:** *Enter each piece of information once, and let sales staff check stock levels in real time.*

Goal	Metric	Today	Target	Deadline

Goal	Metric	Today	Target	Deadline

Note: Three well-chosen goals beat ten. Without a starting value, there is no progress to measure.

04 Users and usage

Describe who will use the solution, on which device, in which language.

QUESTIONS TO ASK YOURSELF

- Which users are the most numerous? Which matter most to you?
- Do they mostly use a phone? Roughly which kind?
- In what conditions: at the office, in the field, on an unstable connection?

> **Example:** *Sales reps in the field on their phones, accounts and warehouse staff on desktops, management following dashboards.*

Profile	What they come to do	Main device	Language(s)	Connection

05 Functional scope

List what the solution must do, in order of priority.

Note: Priority: M = must have at launch, S = should have, can follow shortly after, C = could have if budget or time allows. The suggested rows are starting points: delete, edit, add.

Feature	Description and rules	Priority	Notes
Customers and contacts			
Quotes, orders and invoices			
Stock and purchasing			
Scheduling and field operations			
HR: leave, attendance			
Multi-level approval workflows			
Reports and dashboards			
Mobile access for field teams			

Feature	Description and rules	Priority	Notes

Out of scope: what this project does not cover	

06 Points specific to this kind of project

The questions that always come up on this kind of project. Tick them off once settled.

Processes and data

- [ ] Processes described step by step: who does what, when
- [ ] Business rules: discounts, approval limits, invoice numbering
- [ ] Data to migrate from existing tools, and its quality
- [ ] Roles and permissions by department

Adoption

- [ ] Number of users per department
- [ ] Planned training and support
- [ ] Period running in parallel with the old tool
- [ ] Accounting and tax obligations around invoices: to be checked with your accountant or legal adviser

07 Content, languages and accessibility

Say who provides the copy, images and translations, and in which languages.

- [ ] Languages: French, English, local languages (Wolof or others); which one first?
- [ ] Translations: who writes them, who proofreads them?
- [ ] Existing copy, to rewrite or to create: who writes it?
- [ ] Photos and videos: real ones (team, premises, products) or to be produced?
- [ ] Logo and brand guidelines available as source files
- [ ] Accessibility: contrast, text size, keyboard navigation, screen readers
- [ ] Search engines: which queries should bring people to you?

08 Existing systems and technical constraints

Describe what already exists and what is imposed, to avoid surprises along the way.

QUESTIONS TO ASK YOURSELF

- Which tools, software or websites already exist? Which must be kept or connected?
- Domain name, hosting, accounts (app stores, social media, payments): in whose name are they registered, who has access?
- Is a technology, a host or a hosting country imposed on you?

- Do your users have entry-level phones, or a slow or expensive connection?
- Configured off-the-shelf software or custom development? You can ask for both options.
- Is there accounting software or a bank to connect?

Your answers

09 Security, personal data and compliance

Spot sensitive data and the obligations to meet before choosing a solution.

- [ ] Personal data collected: identity, phone number, location, financial or health data…
- [ ] Who can access what: roles and permissions
- [ ] Backups: frequency, location, retention period
- [ ] Country where the data is hosted
- [ ] Informing people, consent, how long data is kept
- [ ] Formalities with your country's data protection authority

Note: These obligations vary by country and activity: have them checked by your legal adviser. This template is not legal advice.

10 After launch

Plan the life of the solution: maintenance, hosting, improvements, training.

- [ ] Corrective maintenance: response time for a blocking incident
- [ ] Security and dependency updates
- [ ] Hosting, backups and monitoring: who handles them, who pays?
- [ ] Training for your teams, and documentation
- [ ] Ownership of the code, content and accounts (domain, app stores, hosting)
- [ ] Reversibility: getting the code and data back if you change provider

11 Budget

Give a range: without one, the proposals you receive cannot be compared.

Build budget you have in mind (FCFA, excl. tax): from … to …	
Yearly running budget (hosting, maintenance, licences)	
Preferred payment schedule (for instance, at each milestone)	

Item	Range (FCFA, excl. tax)	Comment
Discovery and design (workshops, mock-ups)		
Development and testing		
Copy, photos and translations		
Hosting, domain name, licences (per year)		
Maintenance and improvements (per year)		

Note: A range, even a wide one, commits no one: it saves you from proposals that are out of reach or undersized.

12 Timeline and milestones

Give the dates that matter, and the ones that can move.

Milestone	Target date	Fixed or flexible?	Comment
Processes mapped and approved			
First module in acceptance testing			
Data migration			
User training			
Go-live			

QUESTIONS TO ASK YOURSELF

- Does an event set a date (launch, trade fair, season, school year)?
- Who signs off each step on your side, and how many days does it take?

Your answers

13 Governance and contacts

Say who decides, who answers day to day, and how you will work together.

Role	Name	Job title	Email and phone
Decision-maker (approves budget and deliverables)			

Role	Name	Job title	Email and phone
Day-to-day project lead			
Technical contact			
Content contact			

QUESTIONS TO ASK YOURSELF

- How often do you want a check-in: every week, at each milestone?
- Through which channels: meetings, video calls, email, messaging?
- In which language will the project run?

Your answers

14 What we expect in your proposal

Ask every provider for the same things, so proposals can be compared like for like.

- [ ] Your understanding of the need, in your own words
- [ ] The proposed solution and technical choices, with reasons
- [ ] The timeline, milestone by milestone
- [ ] The team assigned to the project and each person's role
- [ ] A budget broken down by item, recurring costs included
- [ ] Maintenance and warranty terms
- [ ] References from comparable projects
- [ ] Code ownership and reversibility terms
- [ ] Assumptions made and questions still open
- [ ] The proposed approach (custom, off-the-shelf or mixed) and its licence costs
- [ ] The data migration and training plan

Proposal deadline	
Expected format (PDF, slides…)	
Where to send it	
Selection criteria and their weight (price, timing, references, grasp of the need…)	

15 Appendices

Attach anything that helps explain the project.

Document	What it contains
Brand guidelines, logo	
Websites or apps you like (and why)	
Diagrams, mock-ups or screenshots of what exists	
Useful internal documents (procedures, paper forms)	