

Before the Proposal

A checklist for clearer technology decisions

Use this with your team before requesting vendor proposals. Check each item once you have a documented answer. Use unanswered items to guide discovery.

PROJECT / DECISION

01 Define the business problem

- ☐ We can describe the problem without naming a product or vendor.
- ☐ We know who is affected and the impact on time, cost, service, or risk.
- ☐ We have agreed on why this needs attention now.

02 Agree on what success looks like

- ☐ We have separated essential requirements from optional features.
- ☐ We have a current baseline and a measurable target for improvement.
- ☐ We know who will approve the decision and who will use the solution.

03 Map the requirements and constraints

- ☐ We have listed the systems, data, and workflows it must work with.
- ☐ We have identified security, privacy, and compliance requirements.
- ☐ We have set a budget range, timing, and acceptable disruption.

04 Prepare to compare proposals

- ☐ We will give each provider the same written requirements.
- ☐ We will compare total costs over the same period, including setup and support.
- ☐ We will ask about assumptions, exclusions, contract terms, and exit options.

THE DECISION IN ONE SENTENCE

We need to improve [problem] for [people/process], measured by [result], by [date].

Before you send: resolve critical unknowns or ask providers to state their assumptions.

Need help turning these answers into a clear set of requirements?

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