# Options Analysis Template

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| This template has been prepared by the team at [claret.app](https://claret.app) to assist with completing the options analysis phase of technology projects in the Beverage Alcohol industry. You can use the template as a whole or just individual sections depending on where in your project you are up to. Any questions or for any assistance [reach out to the team](https://claret.app/contact-us)! |

# 1 Introduction

Introduce your project at a high level. What is the purpose? Why is this piece of work being undertaken?

Link to the scoping document you prepared at the beginning of the project. (If you haven’t created a scoping document yet, you can find our template to assist with this [here](https://docs.google.com/document/d/1eNMeY6CP1jyNdm2MoTm5TJ8ul1Dhb6rX6w3Ap9Ag2nU/edit).

# 2 Solution Exploration

## 2.1 Technology Options

Introduce the options being analyzed. Provide an overview of what they do and provide links to further information. Research solutions with a proven track record in the beverage industry and do an ‘Initial Fit Assessment’ where you screen for solutions with specific capabilities in beverage sales forecasting and distribution planning.

Then use a sub-section for each option being seriously considered to provide further detail.

### 2.1.1 <<Option 1>>

Name: *The name of the technology*

Website: *The main website for the technology*

Feature overview: *Dot point overview of the key features of the option*

* Feature 1
* Feature 2

Known clients: *List any known companies that use the technology*

Pricing: *Provide high-level pricing if available*

## 2.2 Software Selection

Compare the tools from section 2.1 against your high-level requirements defined in your [Scoping](https://docs.google.com/document/d/1eNMeY6CP1jyNdm2MoTm5TJ8ul1Dhb6rX6w3Ap9Ag2nU/edit?usp=sharing) phase.

### 2.2.1 Solution Shortlist

Define your shortlist. Of the products defined in section 2.1, which were chosen for more detailed analysis and comparison, and why? This will generally be 3 to 5 products.

## 2.3 Feature Assessment

This section provides a more detailed comparison of the short-listed options.

### 2.3.1 Key Requirements

Re-state the key requirements you are looking to meet. Provide priorities against these.

### 2.3.2 Options Analysis

Compare each short-listed solution in section 2.2.1 against your key requirements from section 2.3.1. This can be done in a table with comments against each Requirement and Option. Order the requirements based on priority to clearly see which options meet the most key requirements.

Requirements can also be categorized based on functional and non-functional. Also include technical requirements relating to integrations, security, etc in your analysis.

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| Category | Requirement | Priority | *Option 1* | *Option 2* | *Option 3* | *Option 4* |
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### 2.3.3 Assumptions

List any assumptions made during the analysis

## 2.4 Criteria-Based Evaluation

Based on the feature assessment in section 2.3, define your final evaluation criteria and select your preferred solution.

### 2.4.1 Evaluation Criteria

What are the key criteria used to make your decision? The ability to meet key requirements per your analysis in section 2.3 will be one criteria. Others may be the suitability of the product for the beverage market, support and implementation options and pricing and payment options.

### 2.5.2 Preferred Solution

State the preferred solution along with the reasons and assumptions for this.

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# 3 Conclusion

Summarize why the preferred solution was chosen and the next steps required to move to creation of a business case.