**Project Scoping Template**

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| This template has been prepared by the team at [claret.app](https://claret.app) to assist with completing the scoping 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?

# 2 Scoping

## 2.1 Background

Provide a background for your project. What has led you here?

### 2.1.1 Current State

Introduce the area of the supply chain you are addressing with this project. Explain existing processes and technologies within the context of this.

### 2.1.2 Current Challenges

Detail issues with current processes and technologies. For example, there may be challenges forecasting in the context of beverage seasonality and market trends, or issues with ensuring all stakeholders have a consistent view of data and a single source of truth.

## 2.2 Objective

What are you trying to achieve? What are the key improvements you are hoping to see as an outcome of undertaking this piece of work?

Define goals such as enhancing forecast precision, reducing stock variances during peak demand periods or decreasing inventory.

## 2.3 Scope

What is the scope of this piece of work? It is important to be clear about the boundaries of the project.

### 2.3.1 Key Requirements

What are the key requirements you are looking for in a solution? These do not need to be detailed at this stage. Desired features may be items like advanced demand prediction, inventory management for aging stock, bulk wine planning or crop supply and demand planning. Be clear about any industry-specific requirements so you can later assess potential solutions to ensure they meet your requirements.

### 2.3.2 Key Stakeholders

Which areas of your business will be involved in this work? Identifying the key stakeholders within the scope of the project assists with ensuring all the required key parties are involved at each step.

### 2.3.3 Interfaces

Are there integrations with existing systems, for example your ERP or financial system, within the scope of this piece of work?

## 2.4 Constraints

Are there any constraints that need to be considered? For example, any industry regulations or technical limitations? Is there a need for out-of-the-box solutions with minimal customization to speed up implementation in fast-paced beverage markets.

## 2.5 Assumptions

What assumptions about the state of the business and the market are being made during this project?

### 2.5.1 Cross-Functional Support

List any assumption of buy-in from, for example, sales, marketing, and production teams.

### 2.5.2 Market Assumptions

What assumptions are being made about the state of the beverage market?

## 2.6 Evaluation Criteria

What are the key criteria you will use to assess and ultimately select your preferred technology?

### 2.6.1 Success Metrics

Develop criteria tailored to beverage industry KPIs, like market responsiveness and the ability to manage industry-specific challenges such as bulk wine and grape forecasting.

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# 3 Conclusion

Summarize your key scope points and set the scene for the next phase of your project - Options Analysis.