

PROPOSAL TEMPLATE

Proposal for Project: (name)

1. Submitted by:

One or more clients or their representatives who understand the business requirements. Include the individual's name, phone number, and e-mail address.

2. Description of the Current Situation:

2.1. Describe the existing process, including a brief history.

2.2. Is it tied in to other manual or automated systems?

2.3. Does it impact, or is it impacted by, other departments? Indicate the level of involvement, and how this project will impact their business processes.

2.4. How many people/workstations access the system? How many might be accessing it concurrently?

3. Description of the Proposed Project:

3.1. Describe the project briefly, including the scope and the expected outcome.

3.2. How many people/workstations would access the system? How many might be accessing it concurrently?

3.3. List the business objectives (the business reasons for doing the project). For each objective, explain the following:

3.3.1. Describe the objective.

3.3.2. Is this a new or existing objective?

3.3.3. If new, does it enhance any existing objectives? Support new ones? Does it replace or contradict any previous objectives? Explain how.

3.3.4. Does it add any value, business or other, such as improved service, cost reduction, improved data access? Explain.

3.4. Why does this project need to be addressed at this time?

3.5. What are the consequences if the project is NOT undertaken, for example, loss of functionality, or non-compliance with legal guidelines?

3.6. Did someone or some agency outside your department mandate this project? If so, who? (For example, government agency)

3.7. What other projects, if any, are dependent upon the completion of this one?

4. *Considerations:*

4.1. Describe potential solutions, if any were discussed.

4.2. What business functionality was discussed, but excluded from this project?

4.3. What client resources will be available for analysis and design?

4.4. What are the time constraints—include earliest possible start date, required completion date, business cycles that affect testing, training, or implementation?

4.5. (Optional) List any known technology constraints.

5. *Recommended Resources:*

5.1. Suggest one or two people to represent your department in the preliminary planning phase of this project. The preliminary planning team should include a high-level representative (project sponsor) and one or more people who actually use the processes included in this project.

6. *Rough Cost Estimate:*

This section should be discussed with your C&C representative:

Estimate the size of the project, in light of manpower and time. Based on the size of the project, estimate the minimum and maximum cost of the project.		
	Minimum	Maximum
Estimated Total Cost:	\$	\$
Expected Cost of Next Phase:	\$	\$

7. *Approval:*

Approval of a project means that resources will be committed; it does not guarantee that the project will be initiated immediately, since the project start-up will depend on the availability of the committed resources.

Signature Date

Name/Position/Phone/E-mail

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