SAMPLE DOCUMENT

What a scoped automation project looks like

This is an illustrative scope structure, not a quote or a client deliverable. It shows the level of detail we agree before work starts.

ILLUSTRATIVE SAMPLE · NOT A QUOTE

Automation scope: [Workflow name]

Client: [Client name] · Prepared by: Tsifrix · Version: sample

1. Objective

Reduce manual handling for [one workflow] by automating intake, classification, routing and status updates, with human approval where judgment is required.

2. In scope

- ✓ Map the current workflow and exception paths with the client team.
- ✓ Build the intake and validation layer for the agreed source channels.
- ✓ Configure classification, extraction and routing rules.
- ✓ Integrate with [listed systems] using documented APIs or approved connectors.
- ✓ Create a review queue for exceptions and low-confidence cases.
- ✓ Provide an operations dashboard for volume, status and failures.
- ✓ Test against agreed scenarios and hand over documentation.

3. Out of scope

- New systems not listed in the integration section.
- Data migration beyond the agreed sample set.
- Hardware, third-party licence fees and usage-based model costs.
- Changes to the client's internal policies or approval hierarchy.

4. Milestones and reviews

Milestone	Output	Review
Discovery	Workflow map, assumptions and success criteria	Client sign-off
Prototype	Working path for the primary scenario	Demo and feedback
Build	Integrations, exception handling and dashboard	Scenario tests
Handover	Documentation, training and support plan	Acceptance sign-off

5. Assumptions and client responsibilities

- A named client owner is available for reviews and decisions.
- Access to test environments and documented APIs is provided.
- The client confirms data-processing permissions before live data is used.
- Response times for third-party approvals are excluded from delivery dates.

6. Acceptance and data handling

Acceptance is based on the agreed test scenarios and written deliverables. Credentials are stored in an approved secret store, access is limited to the delivery team, and production data is used only after written approval.

7. Commercials

Price, payment schedule, optional support and validity period are confirmed in the project proposal. This sample intentionally contains no prices.

Need a scope for your workflow? Request a free call and we will map one process before quoting.