

**The Scoping Checklist:** To move beyond "Solutioneering" (picking a tool first) and diagnose the root cause of organizational friction (cognitive jams).

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**Instructions:** Use in the discovery meeting to validate the business case before writing code.

**PART 1: THE DIAGNOSTIC (The Cognitive Jam)** *Start with the friction, not the technology.*

1. **The Core Problem:** What specific workflow is slowing the business down? \_\_\_\_\_
2. **The "Velocity Test":** If a perfect opportunity arrived today, how long would it take to execute this process? (Current Cycle Time) \_\_\_\_\_
3. **The "Router" Test:** Are high-value employees acting as human routers (copy-pasting data) for more than 20% of their week? [  ] Yes [  ] No
4. **The Value Metric:** Fixing this moves what #? (e.g., Win Rate, CSAT, Speed). \_\_\_\_\_

**PART 2: THE SOLUTION DEFINITION (The "What")** *Define the digital teammate hypothesis.*

- **Target User:** (Who is the human partner?) \_\_\_\_\_
- **The "Win" Condition:** (What does a perfect day look like for them?) \_\_\_\_\_
- **Initial Task Allocation:**
  - **Automate (AI-Absorbed):** What drudgery can the agent handle alone? \_\_\_\_\_
  - **Augment (Hybrid):** Where do they collaborate on a draft? \_\_\_\_\_
  - **Elevate (Human-Only):** What strategic judgment remains with the human? \_\_\_\_\_

**PART 3: OPERATIONAL READINESS (The "How")** *Assess the environment to prevent failure.*

- **Data Health:** Do we have clean, accessible documentation (PDFs, SharePoints) to ground the agent? [  ] Yes [  ] No
- **Governance Check:** Does this process involve PII (Personally Identifiable Information) or sensitive IP?  
[  ] Yes (Requires Clean Room Architecture) [  ] No (Standard Sandbox)

**PART 4: THE ENGAGEMENT SCOPE** *Define the boundaries of the project.*

- **Project Type:**

1.  **Trial:** A 14-day "Proof of Concept" to test viability.
2.  **Pilot:** A 4-6 week "Production Build" to drive ROI.

- **Success Criteria:** We will consider this project a success if we achieve:

1. \_\_\_\_\_
2. \_\_\_\_\_

- **Go / No-Go Decision:**

- Proceed to Design** (High Friction / High Value)
- Stop** (Low Value or High Risk)

Completed by: \_\_\_\_\_ | Date: \_\_\_\_\_