

FREE RESOURCE

# Software project scoping checklist for UAE companies

Questions to answer before you talk to a software team. Rough answers are fine, and you can skip what you do not know. Bring this to a free discovery call.

## Answer in your own words

Plain language is better than technical terms.

## Skip what you do not know

Write “not sure”. We work through the gaps with you.

## Bring it to the call

Tick a box when you have an answer and write it beside the question.

## 01 The workflow and the problem

We start from the work, not from screens. A plain description of how it runs today is enough.

- ☐ Which piece of work do you want to run better? Name it in one sentence.  
.....
- ☐ Walk through it from start to finish: who starts it, what happens next, and how it ends.  
.....
- ☐ Where does it slow down, go wrong or get lost today?  
.....
- ☐ What do people use now: spreadsheets, email, WhatsApp, paper, an existing system?  
.....
- ☐ What happens when something changes halfway through, such as a revised request or a late approval?  
.....
- ☐ Which reports or answers do you need and cannot get quickly today?  
.....
- ☐ Is this one workflow, or several that are connected?  
.....

## 02 People and roles

Roles decide what each person sees and can do, so we design them before any screen.

- ☐ Which teams touch this work: site, office, finance, management, suppliers, customers?  
.....
- ☐ What job titles or roles are involved, and what does each one do?  
.....
- ☐ Does anyone outside your company need access, such as consultants, subcontractors or customers?  
.....
- ☐ Who should see everything, and who should see only their own part?  
.....
- ☐ Do people work in the office, on site, or both? Do they use phones, tablets or computers?  
.....
- ☐ Which roles change often, for example temporary staff or project teams?  
.....

## 03 Approvals and rules

Approvals are where most spreadsheet and chat-based processes break. We write them down first.

- ☐ Which steps need someone to approve or sign off?  
.....
- ☐ Who approves what, and does it depend on the type or value of the request?  
.....
- ☐ What happens when an approver is away, or says no?  
.....
- ☐ Which business rules must always be enforced, such as limits, mandatory fields or required documents?  
.....
- ☐ Which decisions need a record of who decided, when and why?  
.....
- ☐ Do any contracts, policies or regulations shape how the work must be done?  
.....
- ☐ Are there exceptions that happen often and need their own route?  
.....

## 04 Systems to connect

A new system rarely stands alone. Knowing what it must talk to keeps later changes small.

☐ Which systems do you already use: accounting, ERP, HR, CRM, email, a document store?

☐ What should flow between them and the new system, and in which direction?

☐ Which of them can be replaced, and which must stay?

☐ Do the existing systems offer a way to connect, or only file exports?

☐ Who looks after each system today, and can we speak to them?

☐ Are there tools people rely on that nobody officially owns, such as shared spreadsheets?

## 05 Data and documents

Existing records and files shape the design, and bringing them across takes care.

☐ What records and documents must the system hold: drawings, contracts, invoices, forms, photos?

☐ Where do they live now, and in what format?

☐ Which existing data must be moved into the new system, and which can stay behind?

☐ How clean is that data today? Are there duplicates, gaps or several versions?

☐ Which documents need versions, expiry dates or approval history?

☐ Who owns the data, and who is allowed to change or delete it?

☐ Do you need to keep records for a set period for audit or legal reasons?

## 06 Arabic and English

Language affects layout, forms, reports and training, so it is decided at the start.

- ☐ Which languages do the people who use the system work in?  
.....
- ☐ Do screens need to switch between Arabic and English, with right-to-left layout in Arabic?  
.....
- ☐ Do documents, reports or emails need to be produced in both languages?  
.....
- ☐ Do names, addresses and notes need to be stored in both?  
.....
- ☐ Are there company terms that must stay in English, or in Arabic, everywhere?  
.....
- ☐ Who will review the Arabic wording before it goes live?  
.....

## 07 Hosting and data location

Where the system runs affects security, cost and who looks after it. There are several valid options.

- ☐ Do you have a preference or a requirement for where data is stored, including the UAE?  
.....
- ☐ Would you prefer it on Azure, on AWS, on private servers managed by Vloud, or in your own cloud account?  
.....
- ☐ Does your company or a client have a policy on cloud providers or data location?  
.....
- ☐ Who should look after hosting, monitoring and updates after launch: your IT team, us, or a third party?  
.....
- ☐ Do you already have a cloud account or an IT team we would work with?  
.....
- ☐ Is there a system built by another team that needs hosting or support too?  
.....

## 08 Security and access

Access rules are designed with the roles, not added at the end.

☐ How should people sign in, and does your company already use a single sign-in system?

☐ Which information is sensitive, and who may see it?

☐ Do you need a record of who viewed or changed what?

☐ Do you have a security questionnaire or policy we should follow?

☐ Do clients or partners require specific controls from your suppliers?

☐ Should we sign an NDA before we discuss details?

☐ How should access be removed when someone leaves?

## 09 What success looks like

A clear picture of success tells us what to build first and how to judge the result.

☐ If the project works, what is different for your team on an ordinary day?

☐ What would you stop doing, and what could you start doing?

☐ Which result matters most: control, speed, accuracy, visibility, or something else?

☐ How will you tell that it is working? Name a check you would trust.

☐ Which part would deliver value first if it were usable early?

☐ What would make you call the project a disappointment?

## 10 Who decides and who uses it

Projects move at the speed of decisions. We plan around the people who make them.

- ☐ Who is the main contact for the project, and who has the final say?  
.....
- ☐ Who else must agree before work begins, such as finance, IT or the owner?  
.....
- ☐ Who will use the system every day, and can they take part in early reviews?  
.....
- ☐ How does your company usually approve a new project or a new supplier?  
.....
- ☐ Is anyone likely to resist the change, and what would help them?  
.....
- ☐ Who will be the owner of the system after launch?  
.....

## 11 Constraints

Limits are easier to design around when we know them early.

- ☐ Is there a date or event this has to be ready for? What is behind it?  
.....
- ☐ Is there a budget range or approval process we should know about? You can leave this blank.  
.....
- ☐ Are there tools, vendors or technologies you must use, or must avoid?  
.....
- ☐ Are other projects or changes happening at the same time?  
.....
- ☐ Can the work be released in stages, with one part used first?  
.....
- ☐ Is there anything we have not asked that we should know?  
.....

## What happens next

**1. Free 30-minute discovery call.** A working session on your answers. If we are not the right team, we say so.

**2. Written scope and proposal.** We confirm scope, timeline and price in writing, one phase at a time, before you commit.

**3. A first module you can use.** We design the architecture first, then release in modules.

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