Software project brief template

Companion to our article “How to write a software project brief: a template to fill in before you ask for quotes”

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Project: _____ Sent to: _____ Date: _____

> Copy the outline below, fill in the square brackets and send it to every supplier you are talking to, with a line asking them to answer the last heading. Write one or two sentences under each heading. If you can only write five, write 1, 2, 3, 5 and 10: they do most of the work.
> The strong versions are examples to adapt, not text to copy.

1 The problem and who has it

What goes wrong today, for whom, in which situations? "We need an app" is not a problem.

Today [who] has to [what], which causes [consequence]. It happens [how often or in which situations].

WEAK LINE
We need an app like [reference app].

STRONGER LINE
Our field staff record a visit on paper and type it in again in the evening; we want it recorded once, on site.

ANSWER

2 Users and the first use case

Who opens it first, at what moment, to do what? Other users can follow.

The first user is [role]. They open it when [moment] to [task]. Other users: [roles].

WEAK LINE
An order module, a customer module, a reporting module.

STRONGER LINE
A customer orders in the evening and the warehouse sees the order at the start of the next working day.

ANSWER

3 How you will know it worked

One to three observable outcomes, written so that a stranger could check them. Not a list of features.

We will consider it worked when [observable outcome 1] and [observable outcome 2].

WEAK LINE
Modern, fast and easy to use.

STRONGER LINE
A first-time user completes an order without asking anyone; the order list opens without making staff wait.

ANSWER

4 What exists today

The current process, the spreadsheets, the systems, screenshots, earlier code if any.

This is done today with [paper, spreadsheet, system]. We can share [documents, screenshots, access].

ANSWER

5 What you know and what you do not

Two lists: decided, and open. Write "we do not know" instead of guessing; a guess hidden in a brief becomes a fixed assumption in a quote.

Decided: [list]. Open or unknown: [list]. Please tell us which assumptions you are making.

WEAK LINE Do whatever is needed.

STRONGER LINE Here is what we know and what we do not; tell us which assumptions you make.

ANSWER

6 Constraints

Platforms, integrations, the data involved, languages, regulation, accessibility, the security bar and any deadline together with its reason.

Platforms: [web, iOS, Android, other]. Must connect to: [systems]. Languages: [list]. Data and privacy: [what we collect, from whom]. Accessibility: [WCAG 2.2 level or 'not decided']. Security baseline: [your choice or 'please propose']. Regulation we know of: [list or 'not known'].

WEAK LINE Make it secure.

STRONGER LINE One customer must never see another's data; sign-in must support [your requirement]; please state which security baseline you work to.

ANSWER

7 Accounts and assets you already hold

Domain, cloud, store accounts, brand files, data, and in whose name each one is.

[Domain, cloud, store accounts, brand files, data], in the name of [whom].

ANSWER

8 Limits of time and money

What is fixed (an event, a funding date) and what can move. If you are willing to state a range, state it; if not, say so.

Fixed: [date and the reason]. Flexible: [what can move]. A spending limit we can state: [range or 'not stated'].

WEAK LINE
We have no budget yet.

STRONGER LINE
Spending is limited by [your limit, if you can state it]; the launch date is fixed by [event]; everything else can move.

ANSWER

9 How the decision will be made

Who decides, who answers questions, and the criteria you will compare proposals on.

[Role] decides; [role] answers your questions, usually within [your response time]. We will compare proposals on [criteria].

ANSWER

10 What you want back

The headings you expect in the reply: assumptions, what is out of scope, questions, how a change is handled, whose name each account would be in.

Your assumptions; what is out of scope; the questions you still have; how a change would be written and priced; in whose name each account would be opened; what we would hold at the end of the work.

ANSWER

Fill what you can in one sitting and leave the rest as "open". An honest "open" is more useful to a supplier than an invented answer. If the brief runs long, headings 1, 2, 3, 5 and 10 are the ones to protect.

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