Project Brief and Scope Worksheet

Create a shared starting point for a technology project and record the decision needed next.

How to use these four pages

1. Read the instructions and fictional example.

2. Complete one proposed stage on page 3. Mark estimates and unknowns.

3. Use page 4 to record decisions and changes.

4. Confirm responsibilities and approval before committing to delivery.

A practical working aid

Use the blank records for your own discussion. Examples are fictional, not client case studies. Print to complete by hand or adapt the prompts in your own document; this PDF is not a fillable form.

Keep completed records confidential. Use references to protected evidence rather than passwords, customer records or sensitive system details.

Online instructions and companion article

Read the guide

Read the article

Source guidance

GOV.UK Service Manual: How the discovery phase works

Public guidance checked 19 October 2026. The source material informs the approach; no endorsement is implied. This worksheet does not authorise expenditure or release, certify a system or replace an agreed specialist review.

Free to use and adapt within your business with the GRCPreneur acknowledgement retained.

A fictional worked example

Illustrative entries only. No real client, vendor result or completed implementation is claimed.

Record	Illustrative entry
Business difficulty	Enquiries are copied between email and a list; responsibility is sometimes unclear.
Users and outcome	The coordinator and owner need to see who will handle each enquiry.
Proposed first scope	An enquiry form, assignment record and agreed user guidance.
Excluded from this stage	Payments, customer account history and a production mobile app.
Open dependency	Confirm platform suitability, access ownership and maintenance arrangements.
Acceptance approach	Use fictional enquiries to check assignment and status with intended users.
Next decision	Owner approves investigation of the proposed scope; no build is authorised yet.

Before using the blank pages

Agree who will review the record and what decision it supports. Mark assumptions, proposed actions and unverified claims clearly. Copy pages 3 and 4 when you need more space.

Your working record

Project / record ID: _____ Date: _____

Problem and evidence

What happens now? What have you observed, and what is only assumed?

Users, outcome and success check

Who needs to do what? How will you assess the intended improvement?

Deliverables and exclusions

What does this stage include? What is outside it?

Constraints and dependencies

Budget/timing assumptions, information needs, supplier checks and risks.

Responsibilities and next approval

Sponsor, users, delivery owner, change approver and checkpoint date.

Use protected evidence references. Do not enter credentials or confidential customer details.

Decision and scope-change record

Related record / requirement: _____ Review date: _____

Decision / proposed change	Reason and impact	Approver / status	Owner / next date

Review before the next decision

- Scope and exclusions are understood.
- Key assumptions have an owner and a confirmation date.
- Acceptance evidence and approval authority are agreed.
- Maintenance and ongoing costs have a named owner.

Decision, authority and next checkpoint

Proceed / revise / defer / stop. State the decision scope, conditions, approver and date.

A completed record documents a review. Approval applies only to the stated scope and does not establish that untested work has succeeded.