

AI Project Scoping Template

Define the problem, success metrics, and constraints before building.

This template helps you clearly define an AI project before development begins. A well-scoped project has a specific problem to solve, measurable success criteria, clear boundaries, and identified risks. Projects that skip this step often fail due to scope creep, misaligned expectations, or solving the wrong problem.

How to use this template: Fill out each section with your team. Be specific. If you can't answer a question, that's a sign you need more discovery. Revisit this document throughout the project to stay aligned.

SECTION 1

Problem Definition

Project Name

Problem Statement

What specific problem are we solving? (1-2 sentences)

Current State

How is this handled today? What's the manual process?

Pain Level

How urgent/painful is this problem?

■ 1	■ 2	■ 3	■ 4	■ 5
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(1 = minor annoyance, 5 = critical business impact)

Who feels the pain?

■ Operations team

■ Sales team

- Leadership
- Finance team

- Customers
- Other: _____

SECTION 2

Success Metrics

Primary Success Metric

What single metric will tell us this worked?

Baseline (current): _____

Target (after implementation): _____

Measurement method: _____

Secondary Metrics (optional)

1. _____
2. _____

SECTION 3

Scope Boundaries

IN SCOPE (what we will build)

- _____
- _____
- _____
- _____

OUT OF SCOPE (explicitly not included)

Being explicit here prevents scope creep later.

- _____
- _____
- _____

DEPENDENCIES (what must exist first)

- _____
- _____

SECTION 4

Constraints

Budget

One-time investment: \$ _____ Monthly ongoing: \$ _____

Timeline

- ASAP (1-2 weeks)
- Standard (2-3 months)
- Soon (1 month)
- Flexible

Technical Constraints

Must integrate with: _____

Must NOT require: _____

Data location requirements:

- On-premises only
- Cloud is acceptable
- In specific region
- No restrictions

Organizational Constraints

Requires approval from: _____

Must work with existing team/process: _____

SECTION 5

Stakeholders

Role	Name	Contact
Decision Maker		
Day-to-Day Contact		
Technical Lead		
End User Representative		

End Users

Who will use this tool daily? Estimated number of users: _____

Who needs to approve before launch?

1. _____ 2. _____ 3. _____

SECTION 6

Risks & Assumptions

Key Assumptions

Things we believe to be true (validate these early)

- 1. _____
- 2. _____
- 3. _____

Risk Assessment

What could go wrong? (Likelihood & Impact: Low / Medium / High)

Risk	Likelihood	Impact	Mitigation

Definition of Done

What must be true for this project to be considered complete?

Sign-Off

	Name	Signature	Date
Project Sponsor			
Technical Lead			

Prepared By			
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Need help filling this out? Book a free scoping session at practicalsystems.ai/contact

This template is provided by Practical Systems. We build AI tools that save time, reduce errors, and scale operations - without enterprise complexity.