Standard Operating Procedure (SOP) Project Scoping and Proposal Development

This SOP details the process of **project scoping and proposal development**, including initial project assessment, stakeholder consultations, defining project objectives and deliverables, resource and timeline estimation, risk analysis, drafting comprehensive proposals, and approval workflows. The aim is to establish clear project parameters and create well-structured proposals that align with client expectations and organizational capabilities, ensuring a successful project initiation phase.

1. Purpose

To outline the standardized approach for scoping new projects and developing client proposals, ensuring clarity, feasibility, and alignment with strategic goals.

2. Scope

This SOP applies to all personnel and teams involved in project acquisition, planning, and business development.

3. Responsibilities

Role	Responsibilities
Project Manager	Leads project scoping, coordinates between stakeholders, compiles proposal content.
Business Development	Initiates proposals, liaises with client, obtains requirements.
Subject Matter Experts	Provide technical input, estimate resources and timelines.
Finance Department	Reviews budgets, cost estimates, and pricing.
Senior Management	Reviews proposals, grants final approval.

4. Procedure

1. **Initial Project Assessment**
   - Receive project inquiry or opportunity.
   - Conduct high-level feasibility review and strategic fit assessment.
   - Document preliminary requirements.

2. **Stakeholder Consultations**
   - Identify internal and external stakeholders.
   - Schedule discovery meetings and clarify objectives/expectations.

3. **Define Objectives and Deliverables**
   - Develop clear, measurable project objectives.
   - List and describe intended deliverables.

4. **Resource and Timeline Estimation**
   - Assess required personnel, tools, and technologies.
   - Estimate duration for each milestone/task.

5. **Risk Analysis**
   - Identify potential risks and develop mitigation strategies.
   - Document risks in a risk register.

6. **Draft Proposal Preparation**
   - Compile all findings, estimations, deliverables, and risk assessments into proposal template.
   - Include pricing, terms, and conditions.

7. **Internal Review and Approval**
   - Circulate draft proposal for internal review (technical, financial, management).
   - Revise as per feedback; senior management grants approval.

8. **Proposal Submission**
   - Submit proposal to client or prospect via agreed channel.
   - Record submission details and follow up as required.

5. Documentation & Records

- Project Scoping Checklist
- Stakeholder Meeting Notes
- Risk Register
- Resource and Timeline Estimation Sheets
- Draft and Final Proposals
- Approval Logs
- Correspondence Records

6. Related Policies & References

- Project Management Policy
- Client Engagement Policy
- Risk Management Framework

7. Revision History

Date	Version	Summary of Change	Author
2024-06-15	1.0	Initial SOP created	PMO