Proposal, paid discovery or pass: 8 signals to read after the call

From the free scoping kit by Netling Digital. Guide: How to Scope a Client Software Project. File > Make a copy to edit. Text in [brackets] is for you to fill in.

Rule: choose by how sure you are of what you'd be pricing, not by how big the project is. If your worst case is more than 1.5 times your likely case, propose paid discovery.

Signal	Send a proposal	Propose paid discovery	Pass
1. The idea	Tested with real users, or a rebuild of something that exists	Not yet tested with users	No clear problem or user, even after the call
2. Core flow	Described the same way twice, screen by screen	Still changing during the call	Can't be described
3. Scope	About 5 to 8 must-haves, few unknowns	Many roles, complex billing or permissions, several unknowns	Everything is a must-have and nothing can move
4. Integrations and data	Few, with services you know	Unfamiliar APIs, data migration or regulated data	–
5. Design	Designs exist, or the interface is simple	No designs, and the product needs them	–
6. Budget	Matches the likely estimate	Far from the estimate, or unknown	Far below any realistic version, and fixed
7. Decisions	One clear decision-maker	Several stakeholders still aligning	Nobody can say yes
8. Fixed price asked for	Fine: the scope supports it	Fix the price of discovery, then of the build	Fixed price, vague scope, no flexibility