



Legacy Wise Advisors

Before You Approve a Business Project

Owners and managers coordinating a business improvement or outside vendor.

This pack supports project organization. It does not replace specialist legal, accounting, engineering or other professional review.

Four checks before you proceed

Write the outcome before the task list

A request such as improve our process is too broad to purchase reliably. Describe the result someone will accept, the current problem and the evidence that would show improvement. Separate essential work from optional additions. Name one approver. If two stakeholders expect different results, resolve that difference before asking suppliers to quote.

Compare the same scope

Send each supplier the same brief, expected deliverables and acceptance checks. Ask what is excluded, who supplies inputs and how revisions are handled. Compare total cost and dependencies rather than the first price shown. Record unanswered questions. A proposal with missing implementation support is not equivalent to one that includes staff instruction and a documented handoff.

Control changes in writing

Treat an extra feature or rushed deadline as a change request. Describe the change, cost, time impact and work it displaces. Keep a pending change out of the accepted baseline until the named approver decides. Store the decision alongside the revised scope. This gives the team a common working version and prevents a casual conversation becoming an assumed commitment.

Close with evidence

Review each agreed deliverable against its acceptance check. List unresolved defects separately from future improvements. Identify the owner of each remaining item, where operating instructions live and which supplier handles support. Preserve the approved version and handoff date. A project is easier to maintain when the next person can tell what was delivered and what remains open.

Your next step

Open question	Who should answer	Next date

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