DEALCRAFT ADVISORY

A SCOPING PLAYBOOK FOR SAP & ERP BIDS

Draw the Line.

Why scope boundaries decide both the price of the deal and the fate of the delivery, and how to set them before you submit.

IN SCOPE

OUT OF SCOPE

For bid directors, pre-sales leads, solution architects and delivery leads at systems integrators, and for the buyers who evaluate them.

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INTRODUCTION

Scope is the deal.

Every ERP price is a sentence about scope. Every delivery problem is that sentence being read differently by two parties, months later, under pressure.

In a competitive SAP or ERP pursuit, scope gets written fast. The RFP is long, the deadline is short, and the team is focused on the win themes, the solution story and the number. The scope boundary (what is in, what is out, what we assumed and what the client must do) often gets assembled in the last week from whatever the solution architects wrote down.

Then the bid team moves on to the next pursuit. The delivery team inherits a fixed price, a go-live date and a set of words they did not write. If those words are vague, the project spends its first months arguing about what was meant, and its last months paying for it.

> *A scope boundary is not a legal defence. It is the first design document of the delivery.*

A good scope boundary does two jobs at once:

FOR PRICING

It turns an open-ended transformation into units you can estimate (objects, interfaces, countries, users, cycles), so the price rests on counted things rather than hope, and contingency is tied to named risks.

FOR DELIVERY

It tells the delivery team and the client who does what, by when, to what standard, and what happens when reality differs. That is what keeps the plan, the team and the relationship intact.

What is inside

1	**The six layers of a scope boundary.** What a complete boundary contains, beyond an "in scope" list.
2	**Ten delivery challenges that start in the bid.** Where projects actually get hurt, and the boundary that prevents each one.
3	**Assumptions that hold up.** Weak versus strong wording, side by side.
4	**Pricing the boundary.** How the boundary becomes the number, the contingency and the change mechanism.
5	**The handover, and the 12-question scope test** to run before you submit.

PART 1

The six layers of a scope boundary

Most bids have an "in scope" list. Far fewer have the other five layers, and that is where delivery disputes come from.

LAYER	WHAT IT ANSWERS	WHAT GOOD LOOKS LIKE
1. In scope	What will we deliver?	Processes, modules, countries, legal entities and user groups, each with a **count** and a reference to the solution design, not a list of SAP module names.
2. Out of scope	What will we *not* deliver, even though the client may expect it?	Explicit exclusions for the things most often assumed: data cleansing, legacy decommissioning, archiving, end-user training delivery, BI rebuilds, third-party system changes.
3. Assumptions	What must be true for the price and plan to hold?	Specific, measurable and testable early, each with an owner and a consequence if it proves false.
4. Client responsibilities	What must the client do, provide or decide?	Named roles, availability (days per week), decision turnaround times, environments, data extracts and third-party coordination.
5. Dependencies	What outside our control does the plan rely on?	SAP, hyperscaler, other vendors, parallel programmes, regulatory dates, with the date each is needed.
6. Change mechanism	What happens when reality differs?	A threshold, a process and pre-agreed rates or unit prices, so a change is a transaction rather than a negotiation.

> **THE TEST**
>
> Hand the boundary to someone who was not on the bid team, typically the delivery lead who will run the project. Ask them to explain what the client is buying, what the client must do, and what triggers a change request. If they cannot do it from the document alone, the boundary is not finished.

Why "count" matters

"Data migration" is not a scope item. "Migration of 38 data objects across 4 company codes, with up to 3 mock loads and 1 dress rehearsal, using client-cleansed data delivered in our templates" is. The second version can be estimated, staffed, tested and, if it changes, re-priced. The first can only be argued about.

PART 2

Ten delivery challenges that start in the bid

These are the problems delivery teams on SAP and ERP programmes keep running into. Almost all of them were decided, or left undecided, during the bid.

01 Data migration is bigger and dirtier than assumed

WHAT HAPPENS

Object counts grow, data quality is worse than expected, and nobody agreed who cleanses. Mock loads slip, then cutover slips.

THE BOUNDARY THAT PREVENTS IT

Count the objects and volumes. State the number of mock cycles. Put cleansing and business validation with the client, in writing, with dates.

02 Interfaces multiply

WHAT HAPPENS

"Around 40 interfaces" becomes 70 once the landscape is properly mapped, and some of them need the other system's vendor to change too.

THE BOUNDARY THAT PREVENTS IT

Price an interface catalogue by complexity band (simple, medium, complex). Exclude changes to third-party systems. Add a unit price for each additional interface.

03 Custom code and "clean core" collide

WHAT HAPPENS

The client expects today's custom functions to survive the move. The design principle says keep the core clean. The gap surfaces in design workshops as unpriced extension work.

THE BOUNDARY THAT PREVENTS IT

State the custom code strategy (retire, re-platform, rebuild as extension) and the number of extensions included. Base it on an actual code analysis wherever you can get one.

04 "Fit-to-standard" means different things to each side

WHAT HAPPENS

The bid promised standard processes. The business arrives at workshops with its current process and its exceptions. Every gap becomes a debate about whether it was "in scope".

THE BOUNDARY THAT PREVENTS IT

Define the decision rule: who can approve a deviation from standard, within what time, and how a deviation is costed. Cap the number of gap items included in the price.

05 Testing ownership is unclear

WHAT HAPPENS

Who writes the test scripts? Who runs UAT? Who supplies test data? Who tests the interfaces at the other end? Each unanswered question becomes a delay.

THE BOUNDARY THAT PREVENTS IT

A test responsibility matrix in the bid: phases, number of cycles, entry and exit criteria, and who does what in each. Regression testing of untouched systems is explicitly out.

06 Client people are not available

WHAT HAPPENS

Key process owners are also running the business. Decisions wait for steering committees. The plan assumed full engagement and gets half of it.

THE BOUNDARY THAT PREVENTS IT

Name the client roles, the days per week each must give, and a decision turnaround time (for example, 5 working days). Say what happens to the plan, and the price, if these are not met.

07 Training and change management are under-sized

WHAT HAPPENS

"Training" in the bid meant train-the-trainer. The client read it as training every end user, in every country, in local language.

THE BOUNDARY THAT PREVENTS IT

State the model, the number of sessions, the languages, the materials and who delivers end-user training. Treat organisational change as its own scoped workstream or exclude it explicitly.

08 Rollouts and localisation hide complexity

WHAT HAPPENS

Each country brings its own tax, statutory reporting, e-invoicing and payroll rules, and those rules keep changing during the programme.

THE BOUNDARY THAT PREVENTS IT

Scope by country and wave. Name the localisation assumed (standard SAP localisation versus additional statutory build). Treat legal changes announced after contract signature as change.

09 Responsibilities split across SAP, the hyperscaler and the SI are blurred

WHAT HAPPENS

Under subscription and cloud models, some of the technical work belongs to SAP or the hyperscaler, some to the SI, and some to the client. Gaps between them land on the critical path.

THE BOUNDARY THAT PREVENTS IT

A responsibility matrix (RACI) for the technical layer: provisioning, basis, security, transports, monitoring and licences. Licences and subscriptions are client-procured unless stated.

10 AI and "innovation" promises have no shape

WHAT HAPPENS

The bid included AI use cases to stand out. Delivery finds no defined outcome, no data readiness, no budget line and no owner.

THE BOUNDARY THAT PREVENTS IT

Scope AI items as bounded pilots: a named use case, a data precondition, a duration, a success measure and a decision point on whether to scale, priced separately from the core programme.

> **TWO MORE THAT BITE LATE: CUTOVER AND HYPERCARE**
>
> Define the cutover window (and who staffs the weekend), the number of rehearsals, and the length and staffing of hypercare. "Hypercare" with no duration tends to run until someone runs out of patience or budget.

> **THE PATTERN**
>
> None of these challenges is unusual, and none is solved by better delivery alone. Each one is cheapest to fix in the bid, with a sentence and a number. Each one is most expensive to fix in month nine, with a change request and a strained relationship.

PART 3

Assumptions that hold up

A weak assumption protects nobody: the client can reasonably read it their way, and delivery cannot test it until it is too late. A strong one is specific, measurable, owned and has a consequence.

WEAK	STRONG
The client will provide clean data.	The client extracts, cleanses and validates data for the 38 in-scope objects using our templates, delivering each load file 10 working days before the relevant mock cycle. Up to 3 mock loads and 1 dress rehearsal are included.
Interfaces will use standard middleware.	The price includes 42 interfaces (24 simple, 13 medium, 5 complex, as defined in Appendix C) built on the client's existing integration platform. Additional interfaces are priced per complexity band at the unit rates in Schedule 2.
Key users will be available as required.	The client provides one process owner per stream for 3 days a week from design through UAT, and returns design decisions within 5 working days. Delays beyond this are managed through change control.
Training is included.	We deliver train-the-trainer sessions for up to 40 client trainers, in English, with materials for 12 roles. The client delivers end-user training.
Standard SAP functionality will be used where possible.	The solution follows fit-to-standard. Up to 25 gaps requiring extensions are included. Any further deviation needs design authority approval and is costed through change control.
Hypercare support will be provided.	Hypercare runs for 6 weeks after go-live with the team set out in Section 7, followed by a formal handover to the client's support model.

> **FOUR QUESTIONS FOR EVERY ASSUMPTION**
>
> **Specific?** Could two reasonable people read it differently? **Measurable?** Is there a number, a date or a standard? **Owned?** Does it say who must make it true? **Consequential?** Does it say what happens if it proves false?

The figures above are illustrative. Your counts come from discovery, the RFP and the client's own data.

PART 4

Pricing the boundary

The boundary is what makes a price defensible: to your own commercial review, to the client's procurement team, and to the delivery lead who has to live within it.

1. Estimate from counted units

Build the estimate bottom-up from the boundary: objects, interfaces, extensions, reports, countries, test cycles, training sessions. When a count is uncertain, price a stated quantity and attach a unit price for the rest. That turns an unknown into a rate card, not a gamble.

2. Tie contingency to named risks

A flat percentage on top is hard to defend and easy for procurement to cut. Contingency linked to specific risks on a register (with probability, impact and an owner) can be explained, and released as risks close.

3. Choose the commercial model to match the certainty

WHERE THE SCOPE IS...	PRICE IT AS...
Well defined, counted and owned	Fixed price, with unit prices for variations
Clear in shape but uncertain in volume	Fixed price for a defined quantity, plus a rate card above it
Not yet knowable (e.g. design-dependent)	A fixed-price discovery or design phase, then a re-baselined price for build
Exploratory (e.g. AI pilots)	A separate, capped pilot with a go/no-go decision

4. Make change a transaction

Agree the change threshold, the process, the turnaround and the rates up front. When the client knows what a change costs before it happens, change control stops being a fight and becomes a normal part of running the programme.

5. Price the options, not just the core

Things the client may want but has not committed to (extra countries, organisational change, additional extensions, extended hypercare) can be priced as separate options. The core price stays clean and comparable, and the client sees you have thought ahead.

> **THE PROCUREMENT VIEW**
>
> A clearly bounded bid can look more expensive than a vague one at first glance. Evaluators who have lived through an ERP programme know the vague one is the bigger risk. Make that easy for them to see: show what your price includes that others may have left out.

PART 5

From bid to delivery: the handover

The scope boundary should be the first artefact the delivery team opens, not something they find in the contract after the first dispute.

Bring the delivery lead in before you submit

The person who will run the programme should review the boundary, the plan and the price before submission, and be able to say "I can deliver this." If they cannot, it is far cheaper to find out now.

Run a formal handover

Within the first two weeks after signature, walk the delivery team through the scope boundary, the assumptions, the risk register and the commitments made in clarifications and orals. Commitments made in a presentation are commitments too.

Turn assumptions into early checkpoints

Each key assumption should become a dated checkpoint in the first phase: data quality confirmed, interface catalogue validated, client roles in place. Test the boundary in month one, while it is still cheap to adjust.

Rebaseline with the client, openly

If discovery shows the boundary was wrong, say so early and rebaseline with the client through the change mechanism you agreed. Projects rarely fail because the first estimate was imperfect. They fail because the gap was left unspoken until it could no longer be closed.

> **WHY THIS MATTERS NOW**
>
> SAP's mainstream maintenance for SAP ERP 6.0 (ECC) on Business Suite 7 ends at the end of 2027, with optional extended maintenance available through the end of 2030 at an additional cost. Many organisations are tendering S/4HANA programmes at the same time, competing for the same experienced people, and often under deadline pressure. That is exactly the environment in which scope gets written fast, and delivery pays for it later.
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> Source: SAP News, "SAP Extends Its Innovation Commitment for SAP S/4HANA, Provides Clarity and Choice on SAP Business Suite 7", 4 February 2020.

THE SCOPE TEST

12 questions to answer before you submit

If any answer is "not sure", that is where the delivery risk sits.

- [ ] 01 **Counts.** Is every major scope item expressed with a number: objects, interfaces, extensions, reports, countries, users?
- [ ] 02 **Exclusions.** Have we explicitly excluded the five things this client is most likely to assume are included?
- [ ] 03 **Data.** Is it written down who extracts, cleanses and validates data, and how many mock cycles are included?
- [ ] 04 **Standard.** Is there a decision rule and a cap for deviations from standard processes?
- [ ] 05 **Testing.** Is there a test responsibility matrix with cycles and entry and exit criteria?
- [ ] 06 **Client roles.** Are client roles, availability and decision turnaround times named?
- [ ] 07 **Third parties.** Is it clear what SAP, the hyperscaler, other vendors and the client each own?
- [ ] 08 **Training and change.** Is the training model stated, and is organisational change either scoped or excluded?
- [ ] 09 **Cutover and hypercare.** Are rehearsals, the cutover window and hypercare duration defined?
- [ ] 10 **Change.** Are the change threshold, process and rates agreed in the bid?
- [ ] 11 **Contingency.** Is contingency linked to named risks with owners?
- [ ] 12 **Delivery sign-off.** Has the person who will run the programme reviewed this and said "I can deliver this"?

Tip: run this test at your final bid review, and again at the first steering committee after signature.

DEALCRAFT ADVISORY

Want a second pair of eyes on your scope?

Dealcraft Advisory provides senior bid direction and independent reviews for SAP and enterprise software pursuits. Our work draws on 30+ years of winning, solutioning and setting up delivery for SAP and ERP programmes across Europe, the Middle East, Africa and Latin America.

We help bid teams draw the line before they submit, so the price holds and the delivery starts on solid ground. For buyers, we help make sure what you are evaluating is what you will actually get.

Book a free discovery call

Bid Director Senior direction of a live pursuit, from qualification to submission.

Independent reviews Fixed-fee Blue, Orange and Red team reviews, including a scope and assumptions review.

For buyers Independent support on ERP procurement, by stage.

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