



DEFINE THE DECISION

Construction software requirements worksheet

Use this fillable worksheet with the people who perform, approve and manage the workflow. The goal is not a feature wish list. It is a clear operational brief that can be compared against buy, connect and build options.

START WITH ONE WORKFLOW

Choose a frequent, important process with an accountable owner. Record what happens today, where work stalls and what a better operational outcome would look like.

WORKFLOW NAME**ACCOUNTABLE OWNER****REQUIRED OPERATIONAL OUTCOME**

What must be observably better?

PROBLEM AND WHY IT MATTERS NOW

Delay, risk, rework, evidence, visibility

CURRENT DECISION PATH

☐ Buy and configure ☐ Connect existing tools ☐ Build a focused application ☐ Hybrid

WHAT MUST BE PROVEN BEFORE DECIDING?



MAP THE OPERATION

Document the current workflow

Describe the work as it actually happens, including handoffs and exceptions. A clear current-state map prevents a new product from reproducing avoidable administration.

TRIGGER

What starts the workflow?

CURRENT STEPS IN ORDER

Include tools, paper and repeated entry

APPROVALS AND HANDOFFS

Who reviews, approves or receives the work?

EXCEPTIONS AND FAILURE PATHS

Missing data, offline work, rejections, corrections

OUTPUTS, RECORDS AND EVIDENCE

What must exist when the workflow is complete?



DEFINE THE OPERATING CONTEXT

Users, data and systems

Requirements should identify who uses the product, under what conditions, which information is authoritative and what each connected system is responsible for.

USERS, ROLES AND PERMISSIONS

Who creates, sees, changes and approves?

DEVICES AND FIELD CONDITIONS

Mobile, desktop, offline, gloves, glare, connectivity

REQUIRED DATA AND SOURCE OF TRUTH

Record owner, format, quality and retention

SYSTEMS TO CONNECT AND INFORMATION TO EXCHANGE

Confirm vendor access and permissions

SECURITY, ACCESS AND OPERATIONAL CONSTRAINTS



BOUND THE WORK

First release, pilot and ownership

Define the smallest useful release, how it will be tested, what success means and who will own the product after rollout. Keep assumptions visible until they are verified.

THE FIRST RELEASE MUST DO

Describe the smallest complete outcome

EXPLICITLY OUT OF SCOPE**PILOT GROUP****PILOT CONDITIONS****MEASURES OF A SUCCESSFUL WORKFLOW**

Completion, rework, time, quality, adoption

OWNERSHIP, HOSTING, SUPPORT AND MAINTENANCE**OPEN ASSUMPTIONS, RISKS AND UNANSWERED QUESTIONS****AGREED NEXT STEP, OWNER AND DATE**