

SCOPE ANALYSIS - DECISION SUMMARY

Internal AI Support Assistant

Original project value - €14,000

CLIENT REQUEST ANALYZED

“Everything looks good. One last thing: could the AI assistant also pull customer information from Salesforce and automatically create support tickets in Zendesk?”

OUT OF SCOPE

New paid work detected.

The request adds two third-party integrations and turns a standalone assistant into a cross-system workflow with new permissions, logic and QA needs.

SCOPENUDGE CONFIDENCE

Clear mismatch between the agreed scope and the new request.

HIGH

Additional work

30-48 h

Recommended fee

€5,800 + VAT

Timeline impact

+5-7 business days

Margin at risk

€5,800

RECOMMENDED COMMERCIAL ACTION

Treat Salesforce + Zendesk as a separate integration workstream. Approve a €5,800 + VAT change order before development begins and extend delivery by 5-7 business days.

KEY ASSUMPTIONS BEHIND THIS ESTIMATE

- One Salesforce org is used through standard APIs with read-only access to selected customer objects.
- Zendesk scope is ticket creation only, not bi-directional sync.
- Client provides sandbox/API credentials and confirms field mappings.
- No additional compliance, data migration or custom middleware is included.

WHY IT WAS FLAGGED

What changed from the original scope.

ScopeNudge separates normal delivery from genuinely new work, then ties the difference to contract evidence.

ORIGINAL SCOPE

AI assistant + knowledge-base setup · web interface · internal authentication · basic analytics · deployment · 30-day post-launch support.

Scope item	Original agreement	New request	Assessment
Assistant core	Standalone assistant	Cross-system workflow	OUT OF SCOPE
Customer data	Knowledge base only	Salesforce customer records	OUT OF SCOPE
Support workflow	Answer / assist users	Create Zendesk tickets	OUT OF SCOPE
Authentication	Internal app auth	Third-party OAuth / API permissions	OUT OF SCOPE
Post-launch support	30 days	No extra support requested	IN SCOPE

NEW DELIVERABLE 01

Salesforce integration

API authentication, customer-data retrieval, object/field mapping, permission handling, errors and testing.

NEW DELIVERABLE 02

Zendesk ticket automation

Automatic ticket creation, field mapping, workflow rules, cross-system orchestration and QA.

QUESTIONS TO CLARIFY BEFORE APPROVAL

- Which Salesforce objects and fields may the assistant access?
- What permissions and user identity should API calls use?
- Exactly when should a Zendesk ticket be created and with which fields?
- Is any bi-directional sync, ticket update or Salesforce write-back expected?

WORKLOAD + PRICING

Turn the scope delta into a defensible fee.

The estimate below is built from concrete workstreams and explicit assumptions - not a single opaque number.

Workstream	Estimate
Integration architecture and API contracts	4-6 h
Salesforce authentication and data mapping	7-11 h
Zendesk authentication and ticket mapping	5-8 h
Cross-system workflow orchestration	5-8 h
Permissions, error handling and security hardening	4-6 h
Testing, deployment and production QA	4-7 h
Documentation and handover	1-2 h
TOTAL	30-48 h

COMMERCIAL RECOMMENDATION

€5,800 + VAT

Recommended fixed integration change order: €5,800 + VAT. The fee assumes standard APIs, clear field mappings and no bi-directional synchronization. Any write-back, migration or custom middleware should trigger a new estimate.

Illustrative demo estimate. Final pricing should reflect the signed contract, your rate card, team capacity and client-specific constraints.

TIMELINE IMPACT + DEPENDENCIES

+5-7 business days

- Salesforce and Zendesk sandbox/API credentials are available at project start.
- Field mappings and permissions are approved before implementation.
- Client-side security review does not introduce a new approval cycle.

SECONDARY SCOPE-CREEP RISK

The phrase “connect Salesforce and Zendesk” can hide a much larger integration program. Lock down objects, write permissions, ticket triggers, sync direction and failure behavior before quoting final scope.

IF ABSORBED INTO THE ORIGINAL PROJECT

Approx. €5,800 of incremental value is at risk, before any downstream revision or support cost.

READY TO USE

From analysis to client communication.

Use the draft below as a starting point, then adapt tone and contractual wording to the relationship.

SUGGESTED CLIENT RESPONSE

READY TO SEND

Hi [Client name],

Yes - both integrations are possible.

Salesforce and Zendesk were not included in the original project scope, and adding them changes the assistant from a standalone tool into a multi-system workflow. The additional work covers Salesforce authentication and customer-data retrieval, Zendesk ticket creation, field mapping, workflow logic, error handling and end-to-end testing.

The additional fee would be €5,800 + VAT, with an estimated 5-7 business-day extension.

If you would like to proceed, I can send a separate change order covering the integration work and the exact systems/fields included.

Best,

CHANGE ORDER - INCLUDED

- Salesforce API authentication
- Selected customer-data retrieval / field mapping
- Zendesk ticket creation and field mapping
- Cross-system workflow orchestration
- Integration testing and production QA

EXCLUDED / REQUIRES RE-ESTIMATE

- Bi-directional synchronization
- Data migration / historical backfill
- Custom Salesforce workflows or write-back
- Additional support / SLA beyond original scope

COMMERCIAL TERMS

Fee

€5,800 + VAT

Schedule

+5-7 business days

Approval

Written approval before work starts.

Tip: paste this change order into your proposal / PM tool and attach the relevant scope evidence.