

OpenCRM · Development requests

Development estimates: your questions answered

How we assess a development request and produce an estimate you can rely on.

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- 02 The six stages
- 03 How development is funded
- 04 Your estimate
- 05 Why this matters

THE JOURNEY AT A GLANCE

Customer request



Estimate process



Estimate accepted



Project delivery

Navy steps are carried out by OpenCRM. Grey steps are your request and your decision.

01 Why we follow a process

Q Why can't I have an estimate based on a short description of my requirement?

Because every request can have knock-on effects. Every development request has the potential to affect existing functionality, future upgrades, user experience, support requirements and long-term product strategy.

For this reason, we do not produce estimates based solely on a high-level description of a requirement. Instead, we follow a structured assessment process to ensure that any estimate provided is realistic, technically achievable and based on a shared understanding of the desired outcome.

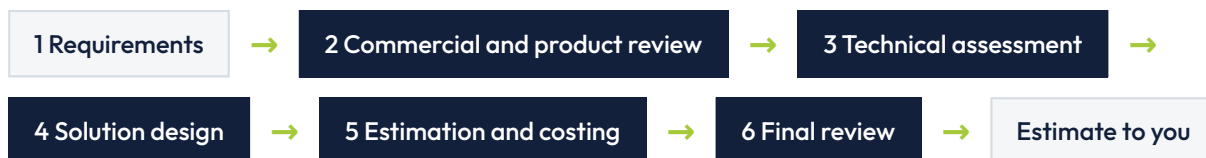
Q How long does the process take?

This process typically takes a few working days and forms the foundation for any subsequent development project.

02 The six stages

Q What are the stages of the process?

There are six stages, from defining the requirement through to a final review and approval before the estimate is sent to you.



Navy stages are carried out by OpenCRM. Grey stages involve you directly.

Q What happens in Stage 1 – Requirements Definition?

We begin by working with you to fully understand:

- The business problem being addressed
- Your current process and workflow
- The desired outcome
- Any operational, compliance or reporting considerations
- Success criteria

This discussion may take place through email, online meetings, demonstrations or other communications.

The objective is to establish a clear and agreed understanding of the requirement before any estimation work begins. This allows both parties to confirm that the scope accurately reflects the intended outcome and provides a sound basis for the work that follows.

Q What happens in Stage 2 – Commercial and Product Review?

Once the requirement has been defined, it is reviewed internally. This review considers:

- Whether the request aligns with OpenCRM's product strategy
- Potential benefits to the wider customer base
- Commercial viability
- Long-term support and maintenance implications
- Compatibility with existing functionality
- Impact on future development plans

This assessment helps determine the most appropriate delivery model and ensures that development effort is focused on solutions that provide long-term value.

Q What happens in Stage 3 – Technical Assessment?

Following the commercial and product review, the requirement is assessed from a technical perspective. This stage reviews:

- Technical feasibility
- Existing platform capabilities
- Potential dependencies
- Risks and constraints
- Architectural considerations
- Alternative approaches where appropriate

The objective is to confirm that a practical and supportable solution exists before detailed estimation work begins.

Q What happens in Stage 4 – Detailed Solution Design?

A detailed technical specification is produced. This defines:

- The functionality to be delivered
- The proposed user experience
- Key development activities
- Configuration requirements
- Data handling considerations
- Testing requirements
- Deployment activities

Alongside the detailed specification, a high-level solution summary is prepared to provide an accessible overview of the proposed approach. This documentation becomes an important reference throughout the lifecycle of the project.

Q What happens in Stage 5 – Estimation and Costing?

Each delivery activity is assessed and estimated. This includes:

- Development effort
- Project management effort
- Quality assurance and testing
- Documentation
- Deployment and release activities

Time is estimated against the individual work elements identified during solution design to produce a detailed and evidence-based assessment of the effort required. The resulting estimate provides transparency over the work involved and the investment required to deliver the agreed functionality.

Q What happens in Stage 6 – Final Review and Approval?

Before an estimate is issued, it undergoes a final review to ensure:

- The proposed solution remains aligned with the approved requirement
- The estimated effort is reasonable
- Technical and commercial considerations have been appropriately addressed
- The proposal provides sufficient detail to support an informed decision

Once approved, the completed estimate is sent to you.

03 How development is funded

Q Is all development funded in the same way?

No. Not all development requests are funded in the same way. As part of the review process, OpenCRM assesses how a requested enhancement fits within the product and its wider customer community. Each request is evaluated against factors such as:

- Alignment with OpenCRM's product strategy
- Potential benefit to other customers
- Long-term maintenance and support implications
- Commercial viability
- Overall business value
- The extent to which the requirement can be incorporated into the core product

This assessment may result in one of three funding approaches.

Q What is a Product-Led Enhancement?

Where a request provides clear value to the wider OpenCRM customer base and aligns with the future direction of the product, OpenCRM may choose to fund the enhancement as part of its ongoing product development programme.

In these cases, you may benefit from the enhancement without being charged development costs.

Q What is Shared Investment Development?

Potentially the right fit where a request provides value to both you and the wider product.

Where this is the case, OpenCRM may choose to contribute towards development costs, with the remaining investment funded by you. This approach enables useful enhancements to be delivered where the full development cost would not otherwise be commercially justified by either party independently.

Q What is Customer-Specific Development?

Where a request delivers value primarily to a single customer, project or business process, the development is normally funded by the customer.

This enables highly tailored solutions to be delivered while ensuring investment in the core product remains focused on functionality that provides wider benefit across the OpenCRM customer community.

Q Does timing affect how my request is funded?

Yes. How useful or logical an enhancement may be is not the only thing that affects where a request fits. It also depends on whether you need it now.

Even useful enhancements can't all be worked on immediately, but they can be scheduled into our Roadmap. Sadly, this may mean waiting an undetermined time for the feature, depending on ever-changing business pressures.

If you would rather not wait, you have the option to fully fund the feature and get it much sooner, within a guaranteed timeframe. In practice, these are often Shared Investment arrangements, even where we would all like to see the feature added. The share depends on how useful the enhancement is and on other commercial pressures.

Q How do the three approaches compare?

Approach	When it applies	Who funds it
Product-Led Enhancement	Clear value to the wider customer base; aligns with the future direction of the product	OpenCRM, as part of its product development programme, generally with less committed timeframes
Shared Investment Development	Value to both you and the wider product	OpenCRM contributes; the remainder is funded by you
Customer-Specific Development	Value primarily to a single customer, project or business process, or the feature is needed sooner than our Roadmap might deliver	Normally the customer

Q What is the purpose of this assessment?

The purpose of this assessment is not simply to determine project costs. It is to ensure that development investment is directed appropriately, balancing the needs of individual customers with the continued evolution, stability and long-term value of the OpenCRM platform.

04 Your estimate

Q What will I receive?

The completed estimate document typically includes:

- A summary of the requirement
- A high-level solution overview
- Key assumptions and dependencies
- Estimated effort
- Development pricing
- Expected deliverables

This provides a clear understanding of both the proposed functionality and the associated investment.

Q What happens if I accept the estimate?

If you choose to proceed, a Sales Order is raised referencing the approved estimate.

The agreed specification and estimate then become the foundation for the development project and are used throughout:

- Project planning
- Development
- Internal quality assurance
- User acceptance testing
- Deployment
- Final delivery

By working from a common, approved specification, both OpenCRM and you have a clear reference point against which progress, testing and delivery can be measured.

05 Why this matters

Q Why does this process matter?

A structured estimation process reduces risk for everyone involved. It helps ensure that:

- Requirements are clearly understood
- Expectations are aligned
- Proposed solutions are technically sound
- Costs are transparent
- Potential risks are identified early
- Delivered functionality achieves the intended business outcome

The resulting estimate is therefore more than a quotation. It becomes the functional, technical and commercial foundation for the successful delivery of any approved development project.

WHERE TO START

Every estimate begins with Stage 1. Tell us about the business problem you want to solve, your current process and the outcome you are looking for, and we will take it from there.

This FAQ is general guidance on how OpenCRM assesses development requests. Each request is assessed individually, and the funding approach and pricing for any enhancement are confirmed in the estimate issued to you.
