

What Comes First?

At Trinity, we frequently get calls from organizations eager to build a new application to meet business needs.

One of our first questions is always the same: Have you clearly defined your scope of work and business requirements?

Why? Because either you're leading the vendor, or the vendor is leading you.

Without a Defined Scope, Vendors Set the Agenda

- Vendors will naturally highlight all the impressive features their software can offer. After the third or fourth demo, everything starts to blur.
- Your team may be dazzled by slick workflows and seamless data movement, but do you know what you need to manage and improve your business today and in the future?
- Their solution will come with its own workflow. How will yours have to change to fit theirs? Will those changes help or hurt your operations?

When You Lead with Process, the Conversation Flips

When you fully understand your business requirements and workflows, vendor conversations shift from their capabilities to your needs.

- Instead of passively watching demos, you can ask pointed questions and evaluate vendors based on how well they fit your current and future operations.
- Your team gains control, clarity, and confidence.

The Power of Clear Documentation

Clearly defining your Scope of Work or Requirements & Workflows up front brings tangible advantages:

- Vendors can respond directly to your documented needs, not generic sales pitches.
- You can evaluate whether vendors ask the right questions to understand your business.
- You can have vendors demonstrate your requirements inside their system to see exactly how closely they match.

- If you issue an RFP, these documents become the foundation for fair, apples-to-apples comparisons.

Two Proven Starting Points

Depending on where your organization is, there are two strong ways to begin:

1. Scope of Work

Most clients begin with a list of “wants.” Our job is to uncover the true “needs” and help define a future vision that improves all aspects of the business.

- A well-defined scope allows vendors to provide a reliable project estimate.
- It gives everyone a shared starting point.

2. Requirements & Workflows

Some clients bring detailed requirements they’ve developed internally. Trinity then leverages decades of process improvement expertise to refine and validate these requirements with the team.

- This step is essential to accurately determine final project cost and timeline.
- Many clients discover additional opportunities during this deep dive.

Our Role: Guiding You Every Step of the Way

Where you start is up to you, but at a minimum, every vendor should receive a Scope of Work. From there, Trinity can help you:

- Define business requirements for any solution, across industries and company sizes.
- Establish best practices that drive to the optimal solution.
- Map future-state workflows for maximum operational efficiency.
- Ensure every piece of the project is aligned for success.

The Bottom Line

Business process should always come first, never the application.

Leading with process puts you in control, reduces risk, and ensures your technology truly enables your strategy.

At Trinity, we bring integrity, excellence, and deep experience to every engagement. We look forward to partnering with your team to make your next project a success

About Trinity

Trinity has partnered with more than 600 organizations to drive measurable improvements in productivity, service, safety, and quality.

As a no-code and low-code application platform provider for over 28 years, we bring deep expertise in designing, developing, and enhancing business applications that meet your exact operational needs. We understand what it takes to build solutions that truly enable your business to scale and succeed.

For more information, to discuss your organization's needs, or to schedule a demonstration of our capabilities, please contact: Nathan Hise at nathan.hise@trinityis.com or 540-850-6987.