



Fill-in template: the problem, the pilot, how it fits with existing tools, cost, risks and exit · spertsuite.com/approval-kit

SPERT® Suite Approval Kit v1.0.0 (Release) · Content reviewed 2026-10-25 · Built 2026-10-26

Prepared by: [PROJECT MANAGER NAME], [TEAM] · **Sponsor:** [SPONSOR NAME, ROLE] · **Date:** [DATE]
Kit facts reviewed against: SPERT® Scheduler 0.79.26, SPERT® Story Map 0.53.14, SPERT® Forecaster 0.47.4, SPERT® CFD 0.15.23, GanttApp™ 0.29.8, MyScrumBudget™ 0.44.4; [Terms of Service](#) v1.4 and [Privacy Policy](#) v1.4 (effective 2026-10-26). **Review date:** 2026-10-25.

This brief supports an approval process. It is not legal, compliance or security advice, and it makes no commitments on the operator's behalf beyond those in the published legal documents.

For the project manager. Aim for two or three pages once it is filled in. Replace every placeholder with your own words and evidence; a specific problem from your own work persuades more than any general claim. Keep the "Where our current tool is the better choice" section: reviewers trust a brief that concedes ground. Delete this box before you send it.

THE REQUEST AT A GLANCE

Item	Detail
What	A [PILOT LENGTH] pilot of [APPS REQUESTED]
Who	[NUMBER] users in [TEAM]
Tiers	[TIERS REQUESTED] (tier 1, local-only use, recommended to start)
Data	Planning data classified [DATA CLASSIFICATION] or lower
Licence cost	None: "Core application functionality is provided at no charge" (Terms of Service §2)
Decision needed by	[DATE], so that [REASON FOR TIMING]

1. THE PROBLEM

[PROBLEM STATEMENT]. Describe a real planning question your team cannot answer well today. Prompts:

- How confident are we in the date or budget we just committed to, and how would we show that confidence to stakeholders?
- When the plan changes, how quickly can we see what the new likely range of outcomes is?
- Where do our current estimates come from, and how often do we miss them? Give one example: [EXAMPLE].

2. WHAT WE PROPOSE

A small, reversible pilot. [NUMBER] people use [APPS REQUESTED] for [PILOT LENGTH] on [PROJECT OR WORK AREA], alongside [EXISTING TOOL], which remains the system of record. At the end we review the success measures in section 6 and recommend continue, widen or stop.

3. WHAT THE APPS DO

SPERT® Suite is six free, browser-based planning apps. Each is used on its own; ask only for the ones you need.

App	What it is for	In this request?
SPERT® Scheduler	Build and maintain a project schedule that accounts for uncertainty, using three-point estimates and Monte Carlo simulation	[YES / NO]
SPERT® Story Map	Map and size release scope before the first sprint	[YES / NO]
SPERT® Forecaster	Forecast how many sprints a backlog will take, as a probability, from sprint history or estimates	[YES / NO]
SPERT® CFD	See where work is piling up, with cumulative flow and flow metrics	[YES / NO]
GanttApp™	Build and share a project timeline with uncertainty included	[YES / NO]
MyScrumBudget™	Plan and reforecast a project or team budget (estimate to complete, estimate at completion, burn rate)	[YES / NO]

SPERT® Scheduler and SPERT® Forecaster use the Statistical PERT® estimation technique; the other apps do not depend on it. Descriptions are from spertsuite.com and each app's documentation.

4. HOW IT FITS WITH THE TOOLS WE ALREADY USE

The middle column is for [EXISTING TOOL]; fill it in honestly.

Capability	Current tool	SPERT® Suite
Probabilistic forecasts of dates or sprint counts	[YES / NO / PARTLY]	Yes, in SPERT® Scheduler and SPERT® Forecaster (Monte Carlo simulation)
Release scope mapping	[YES / NO / PARTLY]	Yes, in SPERT® Story Map
Cumulative flow and flow metrics	[YES / NO / PARTLY]	Yes, in SPERT® CFD
Budget reforecasting	[YES / NO / PARTLY]	Yes, in MyScrumBudget™
Installation	[DETAILS]	None: runs in a web browser
Accounts	[DETAILS]	None needed for local-only use; Google or Microsoft sign-in for cloud storage
Integration with other systems	[DETAILS]	None: file export and import only
Enterprise administration (SSO enforcement, user provisioning, admin console, audit log)	[DETAILS]	Not provided
Vendor support and service levels	[DETAILS]	None: a best-effort service (ToS §2) from a single operator
Licence cost	[COST]	None
AI assistance	[DETAILS]	Optional: connect your own AI assistant in three apps (Connect AI)

Where our current tool is the better choice

Say so plainly. [EXISTING TOOL] remains the right home for [WHAT STAYS IN EXISTING TOOL] (for example: the system of record, portfolio reporting, resource management, integrations with other systems, enterprise

administration and audit, and vendor support). SPERT® Suite is proposed only for [THE SPECIFIC QUESTION IN SECTION 1].

5. COSTS

Item	Estimate
Licence	None (ToS §2). No paid tier exists today
Review effort (security, privacy, architecture, legal)	[HOURS]
Learning time for pilot users	[HOURS PER PERSON]. Each app has a Quick Reference Guide
Ongoing administration	[HOURS]. There is nothing to install or patch on [ORGANIZATION]'s side
Cost to stop	Low: export projects, then stop using the apps

6. SUCCESS MEASURES

Measure	How we will check	Target
[MEASURE 1] (for example, forecast range shared with stakeholders for every milestone)	[METHOD]	[TARGET]
[MEASURE 2] (for example, time to produce a revised forecast after a change)	[METHOD]	[TARGET]
[MEASURE 3] (for example, pilot users who would continue)	[METHOD]	[TARGET]

7. RISKS AND HOW WE LIMIT THEM

Risk	How we limit it
The service changes or stops: the Terms allow it to be "modified, suspended, or discontinued at any time without notice" (ToS §2)	Non-critical use only; regular exports; [EXISTING TOOL] stays the system of record
Data loss in local-only use: local projects live in the browser profile and are lost if site data is cleared	Export [EXPORT FREQUENCY]; one browser profile per person
Sensitive data entered by mistake	Data limited to [DATA CLASSIFICATION]; the Terms of Service (§5.3) already prohibit regulated data
Project data sent to an AI provider	Connect AI not requested, or Write Mode only, or Read Mode only with [AI PLATFORM]
No independent security audit	Tier 1 only, where no project data leaves the device; the source code is public for review

8. EXIT PLAN

If the pilot stops: users export any projects worth keeping, delete them in the app or clear the browser's site data, and anyone who used cloud storage asks the operator to delete their account, which is done "within a commercially reasonable period, not to exceed thirty (30) days under normal circumstances" ([Privacy Policy](#) §6).

9. DECISION REQUESTED

Approve a [PILOT LENGTH] pilot of [APPS REQUESTED], tier [TIERS REQUESTED], for [NUMBER] users, with a review on [REVIEW DATE].

REVIEWER NOTES

- **"Free means unsupported."** Correct: there is no support contract or SLA. The pilot is designed around that: non-critical use, regular exports and a planned exit.
- **"Open source with no vendor review."** No independent audit exists. The code is public, and tier 1 keeps project data on the user's device.
- **"Does data leave our environment?"** Not in tier 1, apart from ordinary page requests (and a country code if SPERT® Scheduler's holiday lookup is used). See the *Information Security Profile* for tiers 2 and 3.
- **"Audit and logging?"** None for users or administrators. That limits the data classification, not the usefulness of a planning pilot.
- **"Why not just use [EXISTING TOOL]?"** We will, for everything it does well. This pilot tests one question it does not answer.