

Client Service Scope Worksheet

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Information-gathering only. This worksheet is not an offer, contract, Statement of Work, NDA, DPA, BAA, authorization, or commitment. DSE review is not acceptance. Do not include PHI, credentials, secrets, production logs, controlled data, or personal consumer or patient data.

Use this worksheet to describe the business outcome, proposed scope, and practical constraints for a potential DSE technical services engagement.

Section	Information to provide
For	Prospective clients considering email hosting, AI hosting, B2B technical services, or cybersecurity and advisory work.
Use	Start a scoped conversation without supplying sensitive source material.
Not for	A request to begin work, authorize access, transmit data, or accept commercial terms.

1. Organization and contact

Provide business contact details only. Do not include personal consumer, patient, employee, or account information.

Organization name and website

Business name, public URL, and primary operating region.

Primary business contact

Name, role, business email, and preferred contact method.

Decision and delivery participants

Business roles who may help define, approve, or operate the work.

2. Business outcome and proposed scope

Describe what should be different when the work is complete. Use categories and examples, not live data or screenshots.

Business objective

What outcome are you trying to achieve or what decision needs support?

Service area of interest

Email hosting, AI hosting, data or AI engineering, cybersecurity advisory, technical integration, or another category.

In-scope systems and data categories

Name systems and broad data categories only. Do not include credentials, records, logs, or data extracts.

Out-of-scope boundaries

Known exclusions, third-party dependencies, and work that should not be included.

3. Delivery context

This helps shape a practical scope. It is not a request for system access.

Timeline and decision date

Target start, preferred milestones, and any non-negotiable dates.

Constraints and dependencies

Existing providers, internal teams, approvals, budget guardrails, or procurement requirements.

Regulatory or contractual context

Name the applicable context at a high level. Do not attach regulated data or customer agreements.

Next step

When ready, request a scope discussion through the DSE Trust Center or engagement channel. A signed agreement and statement of work are required before services begin.

Use a DSE-provided controlled channel for any completed workbook. Do not send sensitive material or PHI through this worksheet, the public website, or an initial inquiry.