

Evidence Locker / Capacity and adoption

Purchase-to-Value Scope Check

Distinguish unused entitlement from a solvable adoption gap or a changed business plan.

When to use it

Use when usage is below the purchased scope or when a planned rollout stalls.

Work the questions in order

1. Compare original purchase assumptions with the customer's current needs.
2. Separate active value, delayed scope, and scope that is no longer relevant.
3. Agree on an adoption action or a commercial conversation based on the actual gap.

Fictional worked example

One business unit is using the product, but a second rollout was postponed. The team confirms whether that second rollout is still funded before assigning a generic adoption campaign.

A note on judgment

Do not assume an oversized purchase means someone acted irresponsibly. Revisit the assumptions with the customer and account team without assigning blame.

Open the related case

[The Oversold Deal](#)

Newly created educational template, not a former-employer document or a validated scoring model. Adapt it to your context. Keep confidential information out of shared copies.

Your working notes

Purchase-to-Value Scope Check / Part 1 of 2

Context or anonymized account: _____

Date: _____ Review date: _____

01 Original intent

What outcome, team, or deployment was the purchase intended to support?

02 Current use and value

Who uses the product now, and what do they get from it?

03 Unrealized scope

What has not been deployed or adopted?

04 Reason for the gap

Is this a learning need, technical dependency, timing issue, funding decision, or changed priority?

From clues to action

Purchase-to-Value Scope Check / Part 2 of 2

05 Customer-confirmed next step

What action is relevant now? Who on the customer side owns it?

06 Commercial coordination

Does the scope need review with the authorized commercial owner?

07 Review evidence

What observation would tell both sides the plan is working?

Before you close the file

Check what is known, what is assumed, and what still needs confirmation. Agree on the next action and the review point. A completed worksheet is not a solved case.