

Digital Project Discovery Checklist

A practical pre-project worksheet for clarifying goals, users, scope, integrations, risks, and delivery expectations before development begins.

1. Business Need & Outcome

- ☐ State the business problem in one clear sentence.
- ☐ Define the expected business outcome.
- ☐ Identify the sponsor and primary decision-maker.
- ☐ Confirm a target launch window or business deadline.

Business problem / opportunity

2. Users & Workflow

- ☐ Identify primary user groups.
- ☐ Document the current workflow.
- ☐ List pain points, delays, manual steps, and workarounds.
- ☐ Capture accessibility and mobile usage needs.

Primary users and top tasks

3. Scope & Functional Requirements

- ☐ Separate must-have capabilities from nice-to-have features.
- ☐ Capture inputs, outputs, approvals, notifications, and reporting.
- ☐ Document administration and operational needs.
- ☐ Explicitly list out-of-scope items.

Requirement	Priority	Owner	Notes

4. Systems, Data & Integrations

- ☐ List systems that must connect to the solution.
- ☐ Identify APIs, databases, files, and third-party services.
- ☐ Confirm source-of-truth systems.
- ☐ Document security, privacy, and retention needs.

Systems / integrations / data dependencies

5. Delivery Readiness

- [] Confirm access to subject matter experts.
- [] Identify UAT owners.
- [] Define deployment ownership.
- [] Define post-launch support expectations.
- [] Confirm budget/procurement constraints.

Discovery Gate

A project is ready to estimate when the outcome, users, must-have scope, integrations, risks, and decision-makers are clear enough to avoid guessing.

Open questions before scoping
