Discovery brief

Turn meeting notes into a shared understanding.

Use this sheet during the conversation. Listen for specific workflows and evidence. Play back your understanding before proposing a solution.

COMPLETED EXAMPLE - FICTIONAL

Lindenworks, Head of CS: 8 of 20 handoffs lack information. Rework time: not yet measured. Trigger: ten hires in November. Agreed: Mara shares three handoffs by 24 Sep; together we measure rework and decide whether a trial is useful.

Account / meeting date	**Attendees / roles**

1 Situation and problem

Decision this meeting should support + problem in the customer's words

Current process / affected teams / specific example / previous attempts

2 Connect impact to evidence

Metric / impact	Baseline + source / period	Target or open measurement question

Discovery brief

Continue the worksheet. Separate facts, assumptions and commitments.

Why now? Customer trigger / date / consequence of waiting

Who decides, holds budget and must be involved? What is confirmed?

Decision criteria / alternatives / keeping the status quo

Playback: Here is how I understand the problem, impact and goal ...

Customer correction / confirmation

Next step / owner / due date / confirmation

COMPLETION CHECK

- [ ] The customer's problem has been restated and confirmed.
- [ ] Business impact is supported by evidence or flagged as an open question.
- [ ] The customer has explained why now.
- [ ] Stakeholders and the decision process have been discussed.
- [ ] The next step has an owner and a date.