

VERX ACO

WORKING TEMPLATE

Project Discovery Worksheet

Clarify the problem, outcome, scope and readiness before solution design.

How to use this worksheet

Complete this before a first discovery conversation, or use it with your team to align on the problem before discussing solutions. Short, concrete answers are more useful than polished language.

Do not begin with a preferred product. Begin with the operational outcome, the people affected and the evidence that the current situation needs to change.

Organisation and contact

Organisation name

Primary contact, role and email

Project or initiative name

1. The problem and the outcome

What is happening today that prompted this project?

Who is affected, and how?

What should be measurably better when the work succeeds?

What happens if nothing changes in the next 6-12 months?

2. Current process and systems

Describe the current process from start to finish.

Which tools, spreadsheets, websites, inboxes or systems are involved?

Where do delays, rework, errors or information gaps occur?

3. People, ownership and constraints

Who owns the outcome and who will use or support the solution?

Which approvals, policies, data rules or external dependencies matter?

Are there fixed dates, budget boundaries or procurement requirements?

4. Scope and success

What must be included in the first useful release?

What can wait until a later phase?

How will you know adoption is working after launch?

What evidence, examples or existing documents can you share?

Before the conversation

- Confirm one accountable sponsor and one operational point of contact.
- Bring examples of current forms, reports, workflows or customer communications.
- Separate must-have outcomes from preferred features.