

Discovery Question Framework

How I turn an initial business request into a focused, efficient discovery conversation.

MY APPROACH I review the request before the discovery meeting, identify what is already known and what still needs clarification, then develop targeted questions specific to the business need.

SECTION 1 FROM REQUEST TO DISCOVERY

REVIEW THE ASK	IDENTIFY GAPS	BUILD QUESTIONS	DISCOVERY MEETING	CLARIFY THE WHY	CONFIRM THE NEED
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SECTION 2 HOW I BUILD THE QUESTIONS

WHAT I LEARN FROM THE REQUEST	WHAT I NEED TO CLARIFY	EXAMPLE DISCOVERY QUESTION
A performance issue is identified	What is actually happening?	What are employees doing today that differs from the expected performance?
A solution has already been requested	Why is this solution believed to be necessary?	What led to the request for training or this specific solution?
A target audience is identified	Who is actually affected?	Is the challenge consistent across the population or concentrated within certain roles or teams?
A desired outcome is stated	What will success look like?	What would we expect to see people doing differently if this is successful?
A launch date is requested	What is driving the timing?	What business event, changes, or dependency makes this date important?
Existing processes or materials are referenced	What else may be influencing performance?	Are process, system, resource, leadership, or environmental factors contributing to the issue?

SECTION 3 THE DISCOVERY MEETING

CONFIRM THE REQUEST Validate the information already provided, resolve assumptions, and make sure the business context is understood.	CLARIFY THE WHY Explore the underlying performance need, contributing factors, desired outcome, and measures of success before selecting a solution.
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The goal of discovery is not to validate the requested solution. It is to validate the problem we need to solve.

REQUEST → TARGETED QUESTIONS → DISCOVERY → CONFIRMED BUSINESS & CAPABILITY NEED