

PROJECT DISCOVERY QUESTIONNAIRE

Start with
the real
problem.

Turn your idea, problem, or opportunity into a clear project plan.

1 PROJECT DETAILS

Project or initiative name: _____

Industry: _____

Company name: _____

Preferred timeline: _____

Primary contact: _____

2 SELECT THE PROJECT TYPE



Website or
customer
experience



Internal
business tool



Customer or
employee
portal



Mobile or web
application



Automation
project



Dashboard or
reporting



Systems
integration



Existing software
improvement



Consulting and
planning



Other

3 MAIN PROMPTS



What are you hoping to
build or improve?



What business problem
should this project solve?



Why is this
important now?



What would happen if
nothing changed?

4 IDENTIFY THE IMPACT



Lost time



Lost revenue



Missed leads



Duplicate work



Customer
frustration



Employee
frustration



Errors or
rework



Poor
visibility



Difficulty
scaling



Outdated
experience



5 DESCRIBE THE PROJECT IN ONE SENTENCE:

We want to create or improve _____ so that _____.

USERS AND CURRENT PROCESS

Map the
real workflow,
not the
ideal one.

Understand who's involved and how work gets done today.

1 DEFINE THE USERS

USER GROUP 1

Who are they?

.....

What are they trying
to accomplish?

.....

What frustrates them
today?

.....

USER GROUP 2

Who are they?

.....

What are they trying
to accomplish?

.....

What frustrates them
today?

.....

USER GROUP 3

Who are they?

.....

What are they trying
to accomplish?

.....

What frustrates them
today?

.....

2 MAP THE CURRENT PROCESS

1

What starts
the process?

.....
.....
.....



2

What happens
next?

.....
.....
.....



3

Who handles it?

.....
.....
.....



4

Which tools
are used?

.....
.....
.....



5

What marks
completion?

.....
.....
.....

3 MARK THE PROBLEM AREAS



Manual



Delayed



Repeated



Error-prone



Requires
approval



Lacks
visibility



Poor customer
communication

4 WHICH PART OF THE CURRENT PROCESS CAUSES THE MOST TROUBLE?

.....
.....
.....
.....

TECHNOLOGY, BUDGET AND CONSTRAINTS

Clear
constraints
make better
plans.

Understand your current setup, limits, and priorities so we can plan smart.

1 CURRENT TECHNOLOGY MAP

Tool category	Keep it	Replace it	Connect it	Unsure
Website	☐	☐	☐	☐
CRM	☐	☐	☐	☐
Accounting	☐	☐	☐	☐
Payments	☐	☐	☐	☐
Scheduling	☐	☐	☐	☐
Forms	☐	☐	☐	☐
Email or SMS	☐	☐	☐	☐
Project management	☐	☐	☐	☐
File storage	☐	☐	☐	☐
Industry-specific software	☐	☐	☐	☐

2 DATA QUESTIONS

- ☐ Does existing information need to be imported? _____
- ☐ Will the solution collect sensitive information? _____
- ☐ Are different employee access levels needed? _____
- ☐ Are there security or compliance requirements? _____

3 CHOOSE THE THREE BIGGEST PRIORITIES

Speed	Budget	Design quality
Features	Flexibility	Ease of use
Scalability	Automation	Security

Select up to three.

4 BUDGET RANGE

- ☐ Under \$5,000
- ☐ \$5,000–\$15,000
- ☐ \$15,000–\$30,000
- ☐ \$30,000–\$75,000
- ☐ \$75,000+
- ☐ Need help determining this

5 TIMING

- ☐ Desired start: _____
- ☐ Important deadline or event: _____
- ☐ Desired launch: _____
- ☐ Flexible or fixed timeline: _____

BETTER EXPERIENCE AND FEATURE PRIORITIES

Prioritize
what makes
version one
useful.

Define the experience you want to create and focus on the features that matter most.

1 TODAY VERSUS BETTER FUTURE

Today	Better Future
People manually do...	The system should...
Customers struggle to...	Customers should be able to...
Managers cannot see...	Managers should be able to see...
Information is repeated between...	Information should flow between...

2 FEATURE BRAINSTORM

Customer features	Employee features	Administrative features	Automation and notifications	Reporting	Integrations
.....					
.....					
.....					
.....					

3 SORT THE FEATURES

MUST HAVE	SHOULD HAVE	FUTURE OPPORTUNITY
Essential for version one success	Important but not critical	Nice to have later
.....		
.....		
.....		

4 THE FIRST VERSION MUST SUCCESSFULLY DO THESE THREE THINGS:

- 1
- 2
- 3

SUCCESS, RISKS AND FINAL PROJECT BRIEF

A strong
brief creates
a better build.

1 DEFINE SUCCESS

Select the outcomes that matter most for this project.

- | | | | |
|---|---|---|---|
| ☐ Hours saved | ☐ Faster turnaround | ☐ Fewer errors | ☐ More leads |
| ☐ Better conversion | ☐ Increased revenue | ☐ Better customer experience | ☐ Easier reporting |
| ☐ Improved employee adoption | ☐ Greater visibility | ☐ Easier growth | |

2 SUCCESS STATEMENT

Within _____ months of launch, we want to improve _____
from _____ to _____.

3 IDENTIFY CONCERNS

Select any concerns that could impact this project.

- | | | | | |
|---|--|--|--|--|
| ☐ Budget uncertainty | ☐ Timeline | ☐ Employee adoption | ☐ Data migration | ☐ Existing systems |
| ☐ Security or compliance | ☐ Ongoing maintenance | ☐ Internal availability | ☐ Previous project problems | ☐ Unsure what should be built |

4 FINAL PROJECT BRIEF

Use this summary to capture the key details of your project.

Project	
Problem being solved	
Primary users	
Desired future experience	
Top three requirements	1. _____ 2. _____ 3. _____
Systems involved	
Budget range	
Target timing	
Success measurement	
Biggest concern	

5 LET'S TURN THIS INTO A PROJECT PLAN

Submit your completed questionnaire to BAAS. We will review the project, identify important questions, and recommend the most practical next step.

[Submit My Project Discovery Questionnaire](#)