Technical Project Discovery Template

A structured template for scoping and aligning on high-impact, high-complexity projects.

Why this matters

High-complexity technical projects often involve multiple teams, systems, and decision points. Without a clear discovery process, projects risk scope creep, misalignment, or fragmented execution. This template helps clarify the "why," define success, and align on scope, constraints, responsibilities, and dependencies—so teams can move with focus and confidence.

How to use

Use this template before building or implementing any system, platform, or complex feature set. It's best completed collaboratively with key stakeholders, then reviewed and updated as the project evolves.

Problem Statement & Context

What is the core problem, and why is it important now?

- Describe the specific issue or gap being addressed.
- Include relevant background (e.g., user complaints, inefficiencies, competitive pressure).
- Explain the urgency or trigger for solving it now.

Primary Customer

Who directly benefits from this project?

- Identify the primary user, team, or customer segment.
- Note any secondary users who are also impacted.
- Include internal and external users, if relevant.

Goals & Success Metrics

What are we aiming to achieve, and how will we know it worked?

- Define the primary goal in one sentence.
- List secondary or supporting goals.
- Specify measurable indicators (e.g., 20% time savings, reduced error rate, increased user adoption).
- Link metrics to a baseline if available.

Strategic Importance

How does this project support organizational strategy?

- Map the project to a specific strategic pillar or initiative.
- Explain how it supports long-term goals, risk reduction, growth, or operational efficiency.
- If applicable, note how this ties into external mandates or funder priorities.

Success Criteria (user story format)

What does success look like when viewed from the future?

- Write 2–3 narrative-style statements that reflect the desired outcome. Example: "A customer support agent can log in, track an issue, and escalate it without switching tools."
- These stories should focus on the end user experience or operational flow.

In scope vs out of scope

What's in vs. out of scope for this project phase?

- Clearly list what problems, features, or components will be addressed.
- Clarify what is explicitly not being tackled (even if related).

Example: "In scope: building internal dashboard. Out of scope: external-facing reporting tool."

Limitations & Constraints

What boundaries or known issues must be worked within?

- Time, budget, legal, technical, or resource constraints.
- Risks that could affect delivery (e.g., third-party delays, legacy system limitations).
- Internal blockers or change management challenges.

Timeline

What are the expected start and end dates?

- Add key dates for:
 - Project kickoff
 - Milestone reviews
 - MVP delivery
 - Launch
 - Post-launch assessment
- Include backup or buffer timelines where needed.

Phases & Milestones

What are the major phases, and what defines each phase's completion?

- Typical phases include
 - Discovery & Requirements
 - MVP Build
 - User Testing
 - Rollout / Launch
 - Training & Documentation
 - Post-launch Support
 - Future Phases (Phase 2, etc.)

• For each phase, identify specific deliverables or exit criteria.

Stakeholders

Who is directly involved or affected?

- List by name or role:
 - Project owner
 - Sponsor(s)
 - Key collaborators
 - Impacted teams or users
- Note how often each group needs to be engaged (e.g., weekly standup, monthly review).

Responsibilities of teams

Who owns which part of the work?

- Break down responsibilities by team or function (e.g., Product, Engineering, Data, Ops).
- Specify ownership for each phase or key deliverable.

Example: "Engineering owns infrastructure setup; Product owns scope sign-off."

Dependencies

What other systems, teams, or resources does this project rely on?

- Cross-team or external collaborations
- Software or data integrations
- Approvals or legal processes

Example: "Depends on API delivery from Team B by August 15."