

Before the first call

You do not need a technical brief. Bring one workflow you would like to improve.

- 01 What starts the work? A form, call, message, spreadsheet, or internal request?
- 02 What happens next - and who does it?
- 03 Which tools are involved?
- 04 Where does it get stuck, repeated, or missed?
- 05 How often does it happen? What is your current baseline?
- 06 What would a useful result look like?
- 07 Which decisions must stay with a person?
- 08 Who can approve the scope, test the system, and arrange payment?
- 09 Are there data restrictions, vendor permissions, or a deadline?
- 10 What budget or running-cost limit should we design around?

If possible, bring a sanitized example. Do not send passwords, confidential customer records, payment card details, or sensitive personal information.

After discovery, a proposal should clearly state the scope, deliverables, acceptance criteria, schedule, dependencies, project price, payment milestones, estimated running costs, and support terms. You approve those before development begins.