



Project Discovery and Delivery Workbook

Use this workbook to move from a free introductory conversation to a scoped engagement, coordinated implementation, and documented handoff. It is a planning tool, not an agreement or authorization to incur fees.

Client and project: [details] Version and date: [details]

Sponsor: [name] Consultant lead: [name] SOW reference: [ID]

1 Discovery and desired outcomes

What problem should improve, and who experiences it? [response]

What does the current process cost in time, errors, delays, or missed visibility? [baseline]

What outcome would make this project successful? [measurable target]

Which departments and systems are affected? [response]

What has already been tried, and what constraints apply? [response]

Who decides scope and accepts the result? [response]

Is remote discovery sufficient, or would an optional onsite visit help? [purpose and proposed dates]

2 Engagement selection

Service area	Possible planning outputs
Strategy and organizational development	Assessment, written plan, priorities, responsibilities
Back-office process improvement	Process maps, bottleneck analysis, procedures
Business intelligence and reporting	Metric dictionary, source mapping, dashboard specification
Automation and integration	Workflow design, interface requirements, runbook
Business systems optimization	Systems assessment, configuration and implementation plan

3 Scope readiness

Before drafting the SOW, confirm sponsor, business objective, included and excluded work, baseline evidence, expected deliverables, dependencies, acceptance method, proposed schedule, fee basis, and any onsite arrangements. Record unresolved questions with an owner and due date.

4 Work plan and ownership

Task and output	Owner	Due date	Dependency
[discovery task]	[name]	[date]	[input]
[design task]	[name]	[date]	[approval]
[implementation task]	[name]	[date]	[access]
[validation task]	[name]	[date]	[test data]
[handoff task]	[name]	[date]	[acceptance]

5 Risks assumptions issues and decisions

Type and item	Impact and response	Owner and due date
Risk [description]	[mitigation and escalation]	[name/date]
Assumption [description]	[validation action]	[name/date]
Issue [description]	[resolution action]	[name/date]
Decision [description]	[approver and rationale]	[name/date]

6 Process and stakeholder assessment

Current-state process steps and handoffs: [map location]

Roles, training needs, and alignment gaps: [findings]

Data and system inputs and outputs: [sources]

Proposed changes and expected benefit: [recommendations]

Adoption and communication plan: [audiences, owners, schedule]

7 Status update format

Reporting period: [dates]. Completed: [outputs]. Next: [tasks]. Milestone status: [on track / at risk / delayed].

Decisions needed: [approver and due date]. Risks or blockers: [impact and action]. Approved scope or budget changes: [change IDs].

8 KPI dashboard planning example

Optional example based on the discussed internal dashboard: Sales, Purchasing, Production, Warehouse, and HR; SQL Server hosts Dynamics GP and SQL backends for Access applications; employees use Active Directory; browser refresh target is 15 to 30 seconds. Confirm these requirements for each actual project.

Department	Candidate measurements to validate
Sales	Sales against target, bookings, backlog, margin
Purchasing	Overdue purchase orders, supplier delivery, price variance
Production	Schedule attainment, throughput, scrap, downtime
Warehouse	Inventory accuracy, picking accuracy, on-time shipping
HR	Headcount, attendance, turnover, overtime, training

9 Measurement definition

KPI name, owner, and business purpose: [details]

Formula, units, reporting period, and target: [details]

Baseline and comparison period: [details]

Source database, tables or views, joins, and filters: [details]

Treatment of cancellations, partial orders, missing data, and time zones: [rules]

Refresh frequency versus actual source-data freshness: [details]

Validation evidence and department signoff: [details]

10 Technical safeguards

Use a scoped read-only service identity for reporting, enforce AD group permissions in the backend, and separate HR access. Plan shared caching so simultaneous viewers do not multiply queries. Measure production query load before rollout. Display last successful refresh and stale-data indicators. Record hosting, monitoring, recovery, and maintenance owners. Production writes or schema changes require separate approval and rollback.

11 Validation and acceptance plan

Test or review	Expected evidence	Owner and result
Data accuracy	[reconcile against approved source]	[reviewer/status]
Permissions	[authorized and unauthorized access checks]	[reviewer/status]
Performance	[query duration and production impact]	[reviewer/status]
Failure behavior	[stale indicator and recovery evidence]	[reviewer/status]
User adoption	[training and workflow feedback]	[reviewer/status]

12 Implementation and rollback

Release scope and approved window: [details]

Client production approver: [name]

Backup confirmation and restore owner: [details]

Deployment steps and responsible person: [runbook]

Stop or rollback criteria: [thresholds]

Rollback steps and validation: [runbook]

Post-release monitoring period: [details]

13 Handoff and closeout

Deliverables and editable source location: [location]

Process procedures and technical runbooks: [location]

Access and ownership transfer: [details]

Training completed and attendees: [details]

Known limitations and open items: [owner/date]

Client acceptance record: [date and approver]

Support period and escalation contacts: [details]

Data return or deletion actions: [details]

Follow-up measurement date and accountable owner: [details]