Discovery call prep checklist

Think through these questions before we meet — it helps us make the most of your time together.

YOUR SITUATION

- [ ] What problem or task are you trying to solve?
  A sentence or two is enough — no technical detail needed yet.
- [ ] Who are the end users, and how tech-savvy are they?
  e.g. office staff, field workers, clients, internal teams
- [ ] Are you replacing an existing tool or SaaS, or starting fresh?
  If replacing: which tool, and what is frustrating you about it?

SCOPE & FEATURES

- [ ] What are the 3–5 things the software must be able to do?
  Focus on must-haves for a first version. Nice-to-haves can come later.
- [ ] Does it need to connect to other systems or data sources?
  e.g. your CRM, ERP, an API, Excel files, a database
- [ ] Web app, mobile app, or both?
  Does it need to work offline or with limited internet connectivity?
- [ ] Do you handle personal data or sensitive information?
  Relevant for GDPR compliance, hosting location, and security requirements

TIMELINE & BUDGET

- [ ] When do you need a first working version?
  A rough timeframe helps us propose the right approach and scope
- [ ] Do you have a budget range in mind?
  No need to be precise — a ballpark helps us suggest the right scope

AI & NEXT STEPS

- [ ] Are there repetitive tasks that could benefit from AI automation?
  e.g. form filling, document processing, reporting, predictions

- [ ] Who will own and maintain the software long term?
  Internal team, us, or a mix? This shapes what we build and document.

No need to have all the answers. We will work through the unknowns together — that is exactly what the call is for.

Book your free discovery call:
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