Client discovery questionnaire: SaaS and web app projects

From the free scoping kit by Netling Digital. Guide: How to Scope a Client Software Project. File > Make a copy to edit. Text in [brackets] is for you to fill in.
Agency note (delete before sending): adjust the budget bands to your market, currency and rates. Section 5 is the one generic intake forms skip, and it is the one that most often turns out bigger than expected.
Thanks for telling us about your project. These questions help us understand it before we talk, so the call can go deeper than a first conversation usually does.
How to fill it in: answer what you can. "Not sure yet" is a good answer: it shows us where the open questions are, and we'll work through them together. Short answers are fine. Please attach anything that helps (decks, sketches, spreadsheets, screenshots of tools you use today).

1. The problem and the goal

1. In two or three sentences, what are you building and why?
2. What problem does it solve, and for whom? How do they deal with it today?
3. How will you know version 1 worked? (a number, a date, a customer outcome)
4. Has anyone outside your team used or paid for a version of this yet, such as a prototype, a spreadsheet or a manual service?

2. Users and roles

5. What types of user will there be? (for example customer, team member, account owner, your own staff)
6. What can each type see and do that the others can't?
7. Can one customer account have several users, such as a company with a team?
8. Roughly how many users do you expect at launch, and after a year?

3. The core flow and must-haves

9. Describe the main thing a user does, step by step, from signing up to getting value.
10. List the features you think version 1 needs. Then mark the five it can't launch without.
11. What can wait until after launch?
12. Which products do you admire or compete with, and what do they do well?

4. Business model, billing and subscriptions

13. How will the product make money? (subscription, per seat, usage, one-off payment, marketplace fee, not decided)
14. Will people pay inside the product? Do you already use a payment provider?
15. Do you need free trials, plans or tiers, coupons, invoices or tax (VAT or sales tax) handling?

16. What should happen when a payment fails or a customer cancels?

5. The admin back office

17. Who on your side will manage users and accounts, and what do they need to do (create, suspend, change plan, delete)?
18. Will your support team need to see what a user sees, or log in as that user to help them?
19. Who can issue refunds, credits or billing overrides, and does anyone need to approve them?
20. Which reports or exports do you need on day one? (sign-ups, revenue, usage, a CSV for your accountant)
21. Do you need a record of who changed what, and when?

6. Integrations and data

22. Which tools must it connect to? (CRM, accounting, email, calendar, your own systems)
23. For each one, do you have API access and documentation, and who owns the account?
24. Is there existing data to bring in? Where does it live, and roughly how much is there?
25. Does anything need to update in real time, or work without an internet connection?

7. Security, compliance and hosting

26. What personal or sensitive data will you store? (for example health, financial or children's data)
27. Which rules or standards apply to you or your customers? (GDPR, HIPAA, SOC 2, PCI DSS, a customer's security questionnaire)
28. Do you need single sign-on, two-factor login, or data kept in a particular country or region?
29. Do you have a preferred hosting provider or an existing cloud account?

8. Design, content and platforms

30. Do you have a brand, designs or wireframes? Please attach them.
31. Web app, mobile app or both? If both, which comes first?
32. Which languages, browsers and devices must it support at launch?
33. Who will write the content: onboarding text, emails, help pages?

9. Budget and timeline

34. Which budget band fits best? Under $20k / $20k to $50k / $50k to $100k / over $100k / not sure yet
35. Is that budget fixed, or could it move for the right version 1?
36. Is there a target launch date? What is the reason behind it (an investor demo, a contract, a season, none)?

37. How much time can you or your team give each week for questions and feedback?

10. Decisions and life after launch

38. Who makes the final decision on scope and budget? Who will be the day-to-day contact?
39. Are you talking to other teams about this project?
40. After launch, who will look after hosting, updates and fixes: your team, a partner, or not decided yet?
41. Is there anything we haven't asked that worries you about this project?

Thank you. We'll read your answers before our call and come with questions on the parts that affect scope and price the most.