Discovery call: qualification script and one-hour agenda

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.

Part A: Qualification (a short call or a few emails)

Aim: decide whether this lead is worth a full scoping process. Four checks, one or two questions each.

- **Fit:** "What made you get in touch with us for this one?" / Is this the kind of product you build well?
- **Budget:** "Projects like this usually fall into one of a few bands. Which is closest for you: under $20k, $20k to $50k, $50k to $100k, over $100k, or not sure yet?"
- **Timing:** "Is there a date driving this, and what happens if it moves?"
- **Authority:** "Who else will be involved in choosing a partner and signing off the budget?"

If two of the four are clearly missing: "Thanks for being open about where things are. It sounds a bit early for a full scoping process. Can I check back in [month], or would you like a couple of pointers in the meantime?"
If they look right: "Great. I'll send a short questionnaire. Once it's back, let's book an hour to go through it."

Part B: The discovery call (about an hour, after the questionnaire)

1. **Open (5 min).** "Here's the plan for the hour. I'll ask some direct questions about budget and priorities. Is that OK?"
2. **Their story (5 to 10 min).** "Tell me how this started. Why now?"
3. **Problem and users (10 to 15 min).** "Tell me about the last time one of your users hit this problem. What did they do?" Note what is tested and what is still a guess.
4. **Scope walk-through (15 to 20 min).** Walk one flow screen by screen: sign up, invite a colleague, pay, something failing halfway. Then walk it again from the admin side: "A customer emails support because they were charged twice. What does your team do, screen by screen?"
5. **Constraints (10 min).** Budget band and whether it can move, the reason behind the date, who decides, and how much time they can give each week.
6. **Approach and next step (10 min).** A short outline of how you'd approach it, then: "I'll send you a written recap. Once you've confirmed it, we'll come back by [date] with either a proposal or a suggestion for a short paid discovery phase first. Does that work?"

A 30-minute version (if the questionnaire came back complete)

Open and their story (5 min) · problem and users (5 min) · scope walk-through, customer side then admin side (10 min) · constraints (5 min) · next step and date (5 min). Cut the approach pitch to one sentence; the recap carries it.

Three habits

- **Ask about the last real time.** "When did this last happen?" gets facts. "Would users want this?" gets hopes.
- **Walk one flow in detail.** This is where roles, permissions, billing rules and edge cases come out.
- **Make them choose.** "If only one of these two could make the launch date, which one?"

Let them talk most of the time. Never end the call without an agreed next step and a date.