

**FRAMING THE PROBLEM**

Project / Discovery Brief

Align on goals, scope, and success before any work begins

Use this when	Kicking off a new project or engagement
Time needed	60–90 minutes, collaboratively
Who's involved	The budget owner and decision-maker
You'll end up with	A one-page agreement on what you're doing and why

How to use this brief

Fill this in at the very start of a project, ideally with whoever owns the budget and the outcome in the room. It forces the conversations that are easy to skip — what success means, what's out of scope, who it's for — before any work begins. Keep it to a single page once it's filled in; if a section won't fit, you haven't decided yet.

1 • The basics

Project name	
Owner / decision-maker <i>Who has final say</i>	
Date & version	

2 • Background & problem

What's prompting this work? What's the problem or opportunity?

EXAMPLE

Bookings have dropped 20% since the new site launched. Users tell support they “can’t find how to schedule.” We need to fix the path to booking before the spring season.

3 · Goals & objectives

What must be true for this to be worth doing? List 2-4 objectives.

4 · Audiences

Who is this for? Note primary vs. secondary — you can’t design for everyone equally.

Audience	Primary / secondary	What they need from this

5 · Scope

In scope	Out of scope (for now)

6 · Success measures

How will you know it worked? Prefer measurable signals over opinions.

Measure	Baseline today	Target

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7 · Constraints, risks & assumptions

Budget, timeline, technical, brand, or legal limits

Known risks and big assumptions we're carrying

Anything here that's both risky and unproven belongs in the Assumptions & Hypotheses Map.

8 · Key dates

Milestone	Date