

Discovery Questions That Change the Recommendation

A practical guide to learning the workflow before deciding whether AI, automation, or any new product intervention belongs in it.

Core idea: Discovery is not collecting a wish list. It is finding enough evidence about the current workflow, pain, constraints, and baseline to make a defensible product recommendation.

Start with the workflow, not the solution

1. CURRENT STATE

What actually happens today?

Walk through the work from trigger to outcome. Ask for the real path, not the official process map.

2. PAIN

Where does it break?

Find delay, rework, handoffs, errors, backlog, workarounds, and moments that require expert judgment.

3. BASELINE

How big is it?

Volume, time, cost, error/rework, throughput, abandonment, escalation, and user effort where available.

Questions worth asking - and why

Ask	What the answer helps you decide
How often does this happen?	Whether the pain is large enough to justify intervention and how much automation could matter.
Who does the work, and does it differ by role or team?	Whether one workflow actually hides several different workflows.
Where do experienced people handle things differently from newer people?	Where tacit knowledge, judgment, or training gaps may be driving the problem.
What happens when the normal path fails?	Exception volume, escalation burden, and whether a proposed solution will survive real-world edge cases.
What information do people need to make the decision?	Data readiness, retrieval needs, permission boundaries, and whether the information even exists reliably.
What would "better" look like?	A measurable outcome rather than a vague goal such as "use AI" or "save time."

Watch for: a stakeholder describing the ideal process while the team actually runs on side channels, spreadsheets, memory, and exceptions. The unofficial workflow is often where the product problem lives.

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Use discovery to narrow the decision, not to create a larger requirements list.

Stakeholder map

BUSINESS OWNER

Goal, cost, priority.

What outcome matters and what would make the effort worthwhile?

FRONT-LINE EXPERT

Reality and exceptions.

Where does judgment matter?
What goes wrong most often?

NEWER USER

Learnability.

What is hard to know, remember, find, or interpret?

IT / OPERATIONS

Systems and constraints.

What can integrate? What data, permissions, maintenance, or security issues matter?

Turn answers into a decision

Evidence about current workflow



Pain + baseline



Constraints + exceptions



Options



Recommendation + what would change it

Evidence that supports moving forward

- Recurring, measurable pain.
- Users can describe the decision or task clearly enough to test.
- Needed information is available and permissioned.
- A narrower pilot can create value before full automation.

Evidence that should slow you down

- Low-volume annoyance with little business impact.
- Problem is mostly upstream process ambiguity.
- Critical data is missing, stale, or inaccessible.
- Success depends on exceptions nobody can yet define.

Fast discovery notes template

CURRENT WORKFLOW Trigger → steps → handoffs → outcome

PAIN Where, for whom, how often, what it costs

BASELINE Volume / time / quality / rework / escalation

CONSTRAINTS Data, systems, permissions, policy, adoption

UNKNOWN What you still need to verify

NEXT STEP Smallest evidence-gathering move

A good discovery conversation should make the solution space smaller. If every answer only adds features, you probably have not reached the real decision yet.