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The Critical Questions to Ask When Scoping a Project

How the Design Needs Assessment delivers the greatest customer value, on-time and on-budget

The following post is based on an article written by Fresh Tilled Soil Senior Project Manager, Jayne Heatherington.



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At [Fresh Tilled Soil](#), we begin most of our projects with an activity we call a *Design Needs Assessment* (DNA). It's a meeting with a potential client that happens even before project scoping. From a project management perspective, this is a dream as it helps us write better, more comprehensive Statements of Work, using the prospect's language as the base. **But that's not why we do it.**

Moving from ambiguity to certainty with a DNA

One of our goals and responsibilities is to help our clients feel secure in engaging with us at every step of the way. We know that building and maintaining trust is the most essential ingredient to a successful partnership. From the earliest conversations all the way to the end of the project, we're building a foundation with our clients that will withstand the bumps that can occur during complex, high-risk design projects.

Working with an outside partner can be scary and uncomfortable. Stated simply, our clients' largest risk is ambiguity. They have a sense that we'll be able to uncover solutions together that they didn't think about on their own, but they're not always sure how it's going to work or what to expect along the way.

Uncertainty can lead to all sorts of problems — misalignment of goals, lack of trust, mismanagement of the budget, and most frightening of all, building the wrong thing. To do our job effectively, we must move the needle from ambiguity to certainty. Becoming an extension of your team means creating a shared understanding of all the problems you experience and how you work as a company.

We really do want to embrace your dirty laundry.

The DNA is a way for a prospect to understand the way we think — and importantly for us to understand the way they think. It also allows us to have a working session where we get to know their company, people, product, goals, expectations, fears, etc. The DNA is also when we start to define the activities that will be needed as part of the project. The goal is to put together an accurate proposal summary which outlines the goals, objectives, timeline, and estimated costs.

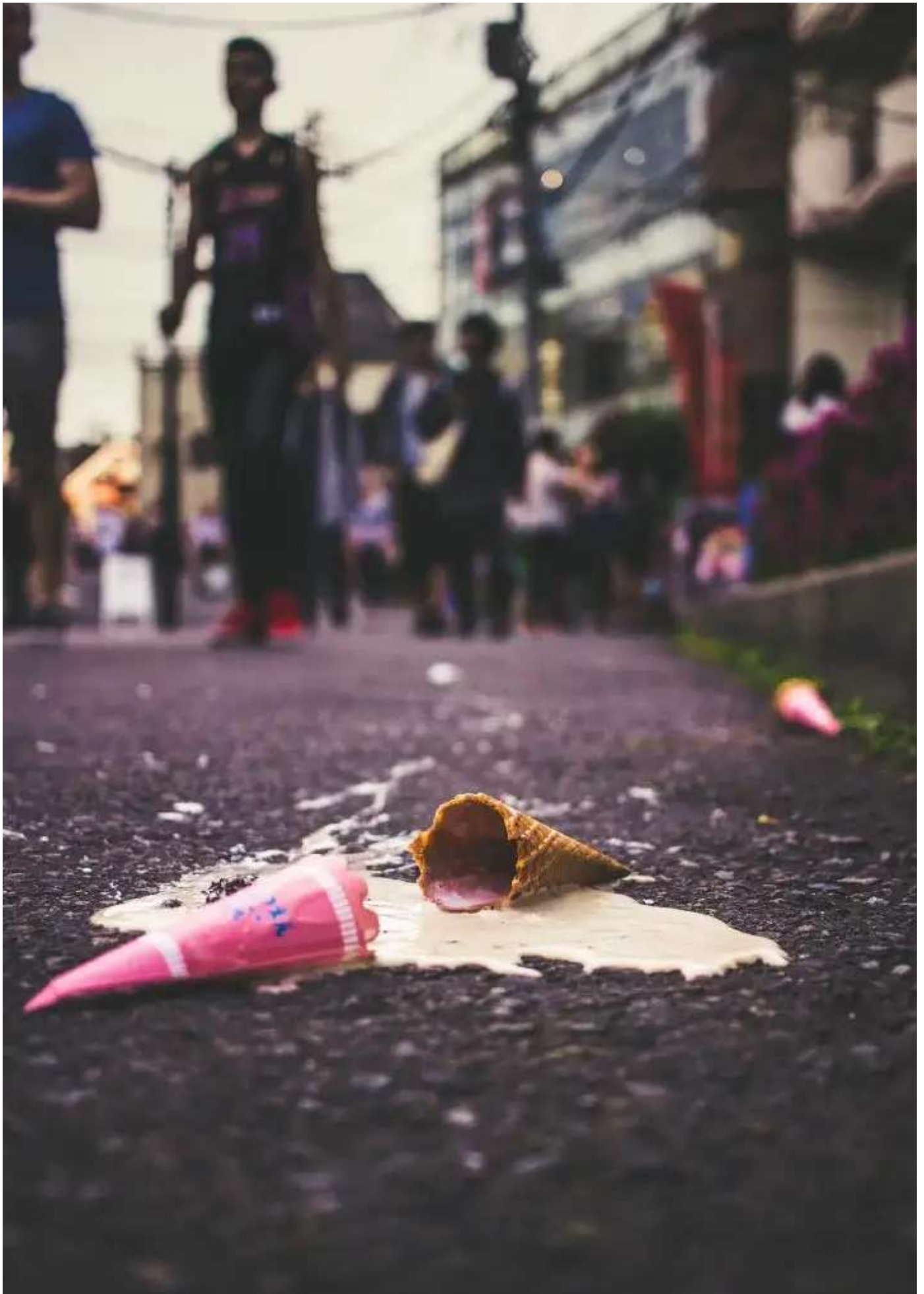
After years of these meetings, here are the critical questions we've found need to be answered before we scope your project.

What do you want out of the engagement?

I don't mean deliverables. Even more important than "what are you trying to build?" we want to know: What questions are you trying to get answered? Who are you trying to please (both internally and externally)?

Outputs are flexible; vision and goals are not.

How could we screw this up?



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Next, identify your biases. Biases are real, and they affect both how we approach your project and how we communicate with you. Ignoring them doesn't make them go away. If you tend to see everything through a marketing lens and don't understand technical feasibility, tell us that. If engineering rules the roost and product has a difficult time finding influence, we should know that. It's not your job to hold every role. Let us know how to talk to you.

Becoming an extension of your team means creating a shared understanding of all the problems you experience and how you work as a company.

Are there any “voices in the shadows”?

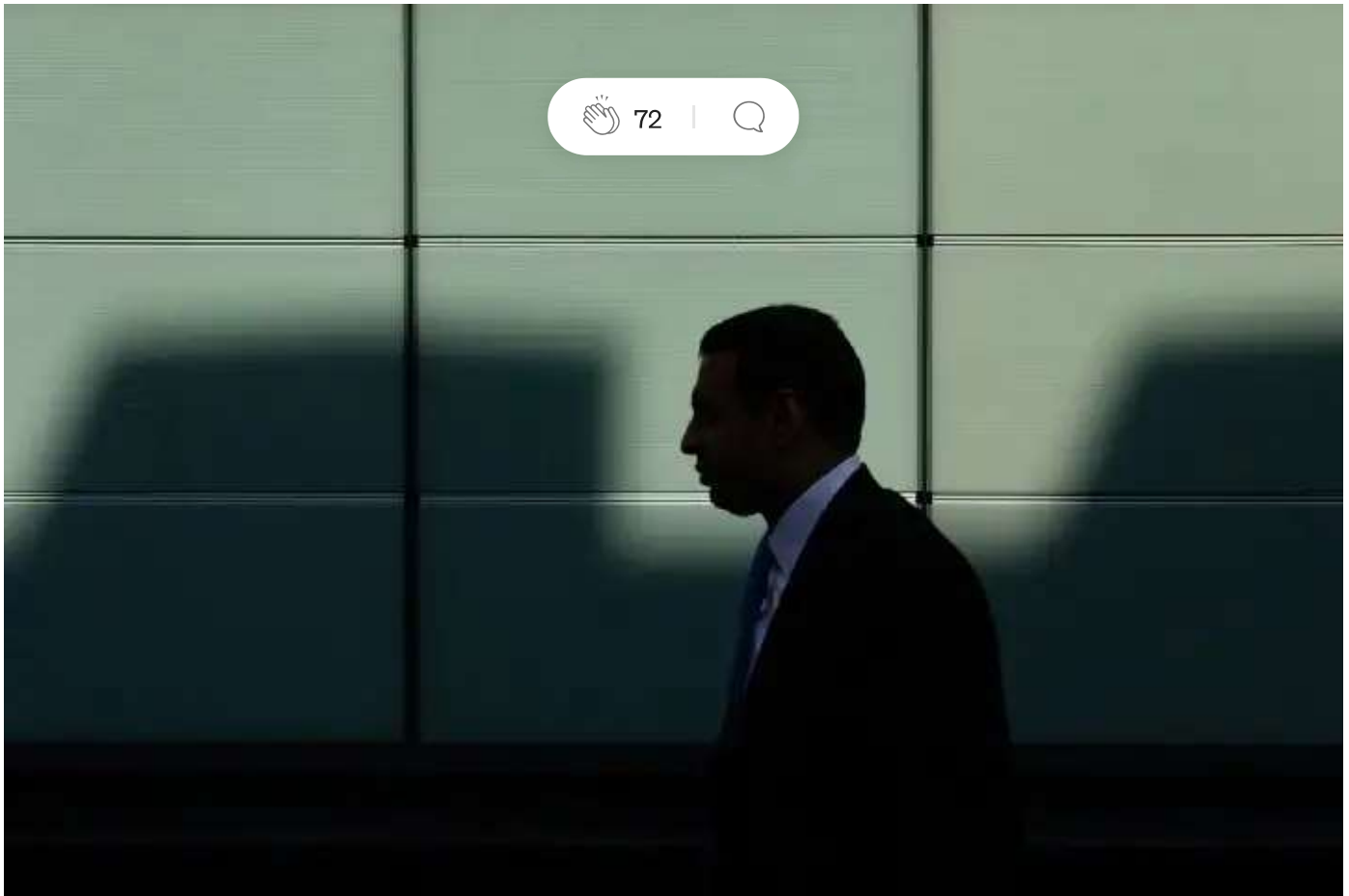


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In other words: Who has skin in the game but is too busy to show up to meetings? When the CEO shows up to the final design review after missing the multiple conversations leading up to it, her/his feedback will only exist in a vacuum. We want to identify these stakeholders up front and make sure their voices are heard throughout the process, not at odd intervals.

At a Design Needs Assessment for a project that recently wrapped up, the marketing director mentioned that we MUST talk to Joel, to which the product owner responded: *Who's Joel?* Joel (a customer support rep) ended up being a key voice in shaping the product direction and understanding target customers.

What keeps you up at night?





Our job is to address your anxieties head on. A big part of our role is to help you sleep better about your product, your website, our project. Show us the list of things you jot down in a state of panic at 3am. We'll tackle those first.

When we understand our clients' concerns and fears, we can utilize helpful strategies at the ready. For example, a process diagram that describes the steps and sequence of a product design project and lists out recommended activities and deliverables a client can expect creates a shared understanding of the big picture view, helps to alleviate feelings of being unprepared, and minimizes the perception of risk.

During another recent Design Needs Assessment, a client mentioned offhandedly that their in-product messaging read "like a ransom note." Content audit and revised conversion flow were duly added to the priorities list.

We know we're successful when we've listened really well, then connected the dots to provide a solution that meets our clients' needs. When we've explored options and clearly explained how we can provide value across a range of options and price points we all win. When we've talked through risks and how we'll handle difficult conversations if the need arises.

Even during the earliest stages of communication, we have an opportunity to demonstrate what it's going to be like to work together. The process of agreeing on the right approach and confirming how we'll work together signals how collaborative the engagement itself will be.

Although the Design Needs Assessment may seem like an extra step and an extra meeting, it truly does make the entire engagement moving forward happen more efficiently and effectively. Figuring out why we're all gathered in the same room in the first place goes a long way in making teams on both sides more productive.

Do you have a user experience or product challenge that you'd like to discuss? Let's talk!

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