🔍 What is Requirements Discovery?

AKA Requirements elicitation: is the systematic process of discovering, understanding and documenting stakeholder needs, aligning on goals, and setting projects up for success. This is one of the most critical skills for any BA.

🧭 Discovery Workshop Agenda – Best Practices & Guidelines

This template is designed to help you plan and facilitate a well-structured Discovery Workshop. You can adjust the number of days and content depending on the size and complexity of the project. Below are some best practices to guide you:

1️⃣ General Flow & Scheduling Tips

- **Day 1 – Kickoff & Context Setting:**

    - Start with a **Kickoff Session**: introduce the team, align on objectives, and walk through the workshop agenda.
    - Present and discuss the **existing (AS-IS) processes** or systems to ensure a shared understanding of the current state.

- **Middle Days – Deep Dive Sessions (AM Focus):**

    - Reserve morning hours (before 3:00 PM) for:

        - **Functional Deep Dives** (per capability or feature group)
        - **Technical Conversations** (architecture, integration, security, etc.)
        - **UX Meetings** (Day in life of the the users, mockups, pain points)

    - These sessions should involve relevant stakeholders and domain experts.

        As part of your preparation, ensure that each participant is invited in advance, clearly understands the purpose of the session, and knows why their presence is important and how they can contribute.

- **Breaks & Lunch:**

    - Include **short 15-minute breaks** mid-morning and mid-afternoon to keep energy levels high. ☕
    - Block a **lunch break (usually 1 hour)** for everyone to recharge. ⚡

- **Afternoons – Recap & Internal Work:**

  - After 3:00 PM, schedule:

    - **Team huddles or internal syncs** to recap the day.
    - **Q&A sessions**, internal alignment, or backlog processing.
    - Buffer time so participants can **catch up on their regular work**.

      Also let's be honest, you don't want sleepy brains making important decisions or discussing complex topics after a full day of workshops. 💤☕

- **Last Day – Wrap-Up & Next Steps:**

  - End with a **Workshop Closure** session to summarize findings, align on open questions, and define the **next steps** (e.g., documentation, backlog grooming, prioritization).

📂 Example Template (available in Templates/Downloads)

	Timeslot	Monday	Tuesday	Wednesday	Thursday	Friday
A M	09:00 - 09:45	Kick-off Walk through the workshop agenda.	Deep-dive: Functional requirements	Deep-dive: Functional requirements	Deep-dive: Functional requirements	Workshop closure
	09:45 - 10:30	Overview of existing (AS IS) business	UX Session	UX Session		
	10:30 - 10:45	*15 min. break*				
	10:45 - 11:30	Overview of existing (AS IS) technical	Technical workshop	UX Session	Deep-dive: Functional requirements	
	11:30 - 12:15					
P M	12:15 - 01:15	*Lunch*				
	01:15 - 02:00	Identify existing pain points	Deep-dive: Functional requirements	Deep-dive: Functional requirements	Ways of working	*Workshop outcomes*
	02:00 - 02:45	Mapping goals to new features	Technical workshop	Technical workshop	Technical workshop	
	02:45 - 03:00	*15 min. break*				
	03:00 - 03:45	*Recap & Internal Work*	*Recap & Internal Work*	*Recap & Internal Work*	*Recap & Internal Work*	
	03:45 - 04:30					
	04:30 - 05:00					

🌈 Use Color Coding for Clarity

Legend
Organizational
Functional requirements
Technical conversations
UX sessions
Internal Team Organization