CRITICAL FUNCTIONS DISCOVERY MEETING OUTLINE

1. INTRODUCTION & FRAMING

Goal: Set context, reduce anxiety, build rapport.

2. MISSION & ORGANIZATIONAL CONTEXT

Purpose: Understand the "business before technology."

- Can you describe your mission and the impact you aim to create?

- Who are your beneficiaries, partners, or stakeholders?

- What services or initiatives does your team deliver day-to-day?

- How long have you been with the organization, and what has your role consisted of?

- What do you enjoy about your role? What challenges do you face in delivering services?

3. ROLES, WORKFLOWS & PROCESSES

Purpose: Learn how work gets done.

- Walk me through your workflow for a typical project or service delivery.

- Which departments or individuals are involved at each stage?

- What information or data is used, created, or shared at each step?

- What tools/applications do you use during the process?

- If a tool or system was unavailable, is there a manual workaround?

4. "BAD DAY" SCENARIOS

Purpose: Identify the highest-impact functions and systems.

- What would a "bad day" look like for you or your team?

- What systems or functions would be most disruptive if unavailable?

- What information, tools, or workflows are the hardest to replace or recover?

- If you could only protect 3 tools/functions, which would they be?

- Which functions should receive special attention or prioritization?

Goal Output: Top critical functions ranked **1-5** for protection.

5. TECHNOLOGY & DATA (AFTER BUSINESS CONTEXT ONLY)

Purpose: Map technology to the business functions — not the other way around.

- Which systems support your daily work (email, CRM, cloud storage, project tools, etc.)?

- Where is important data stored (cloud, personal devices, shared drives)?

- Are you operating in a cloud, hybrid, or on-prem environment?

- Do staff or volunteers use personal or company-managed devices?

- Who has access to each system, and how are permissions granted?

6. CROSS-VALIDATION ACROSS TEAMS

Purpose: Confirm interpretation and eliminate assumptions.

- "Here's how I understand your workflow — does this match your view?"

- "Your department relies on X tool for Y function. Is that accurate?"

- "Are there any steps or tools missing from this process?"

7. CLOSE & NEXT STEPS

- Thank the client for their time and insights.

- Discuss Next Steps

  o Summarize the most critical functions

  o Identify the systems that support them

  o Rank

  o Send Deliverable

SUMMARY CHECKLIST

- Mission & Context Understood
- Daily Workflows Mapped
- Critical Functions Identified & Ranked
- Supporting Systems Documented
- Cross-Department Feedback Collected
- Next Steps Communicated