# Watsonx.ai: Sample Discovery Session Questions

**Customer name:**

**Seller/tech seller:**

**Opportunity type:**

1. *Foundation models only (LLM) - platform*
2. *Foundation models only (LLM) – use case*
3. *Data science and foundation models – platform*
4. *Data science and foundation models – use case*

*Note: Questions in this document should be used to* ***facilitate*** *the discovery session with the client. It’s not necessary to send the questionnaire to the customer and ask them every questions. It’s also possible to ask the open-ended questions from the Top Questions section – the client will likely provide answers to many questions in one answer.*

## Top questions to ask – generative AI

1. Have you identified use cases for generative AI/LLM?
2. Do you implement NLP/NLU use cases in your company today?
3. Have you used any LLMs in testing, POCs or production?
4. Do you have any concerns about deploying LLMs in production?
5. What is your current data science platform?

## Top questions to ask – data science

1. What data science platform do you use today?
2. Do you deploy models?
3. What issues do you experience in your current data science platform?
4. Is *trusted AI* important in your organization?
5. Have you implemented *trusted AI*?

## Detailed Discovery Questions: Team

1. Data science team members and their skills: number and type - open source programmers, citizen data scientists, optimization experts, etc.
2. Team experience (maturity of the data science team).
3. Who “owns and drives” data science in the company (analytics team, IT, or Line of Business)
4. Is the customer looking to grow the number of citizen data scientists?
5. If the customer is using LLMs, which ones?

## Discovery Questions: Tools and Platform

1. What are the main things that the customer is looking for in a data science/AI/LLM platform?
2. Data science tools and LLMs that the customer is using today: open source and 3rd party vendors.
3. Data sources that are used for data science projects.
4. Overall strategy for data science: for example – only open source or “use the right technology for the right task” (i.e. use software if it can deliver better/faster results).
   * If open source, which languages and frameworks?
   * If tools, which tools?
5. Is the customer interested in AutoML? If yes, for what type of use cases?
6. Does the customer have LLM and/or traditional NLP use cases?
7. Does the customer deploy or plan to deploy models?
   * Number and type of deployed data science assets (models, scripts, PMML, Shiny apps, etc.)
   * Types of deployment: real time, batch , steaming
   * How often are they refreshed?
   * Do you need to automate deployment?
   * Do use CI/CD process for deployment?
   * Who works on deployment in your company?
8. Does the customer monitor models for accuracy?
9. Is model explainability a requirement for the business?
10. Are you concerned about bias introduced by a model?
11. Do you use a *catalog* to manage data for both data science and non-data science projects? If not, would you like to understand *catalog* use cases and capabilities?
12. What platform/skills/use case challenges does the customer have? Examples:
    * **Platform**: data quality, data access, governance, scalability, deployment
    * **Skills:** notenough programming skills
    * **Use cases**, i.e. need help figuring out how to implement a particular use case

## Discovery Questions: IT Requirements

1. Does your company have a set of IT standards for all software? Examples:
   * Cloud provider (AWS, Azure, GCP, IBM, other)
   * Kubernetes (OpenShift or other)
2. Does your company have an “approved software list”? Which data science tools/platforms are on that list?
3. Does your company prefer SaaS or an on premise/dedicated cloud deployment of the data science platform?

## Sales Strategy

Data science/AI/LLM opportunities typically fall into two categories: a **platform** opportunity or a **use-case opportunity.**

In a **platform** opportunity a customer has an established data science/AI practice and they are already using open source tools. These types of customers look for a specific set of *features* in a data science/AI platform.

In a **use case** opportunity we are usually working with the line of business, for example, a marketing, an HR, or a fraud department. The customer in this case is interested in implementing a specific use case with data science.

* It may be possible to close a **platform** opportunity by doing a custom demo or running a workshop
* **Use-case** opportunities will most likely require a *Client Engineering* engagement – start the qualification process ASAP but don’t skip other steps in the sales cycle.
* Always offer to run a workshop – it’s a strategy to avoid a POC/POT.

