



PRODUCT DEVELOPMENT

Product discovery workshop kit

Preparation, facilitation and decisions

Run a focused session that connects the user problem, current task, first-release boundary and investigations needed for the next product decision.

THE WORK

Prepare evidence, involve the people who operate and deliver the service, and name the decision owner.

THE RESULT

A working brief with explicit scope, unresolved assumptions, accountable investigations and a recorded decision.

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01 / PREPARATION

Prepare the product decision

Purpose and outputs

A discovery workshop brings the business, customer experience, delivery and operational perspectives into the same conversation. Its value is the decision that follows: what problem to pursue, what the first product needs to accomplish, what remains uncertain and what the team must learn before committing further effort.

This kit provides a preparation brief, a 150-minute working agenda, facilitation prompts and a decision record. It is designed for a focused product opportunity. If the discussion contains several unrelated audiences or business problems, separate them into distinct discovery sessions so each can receive adequate attention.

The meeting should produce a defined user problem, a current-task map, an initial scope boundary and a short investigation plan. Product requirements and delivery estimates can then develop from that shared basis.

Preparation and participants

Write the decision the workshop will support in one sentence. Establish the limit of the team's authority: it may recommend a pilot, choose a problem to investigate, agree a first-release boundary or identify the evidence required for an investment decision. Tell participants which outcome is expected before asking them to contribute.

Select participants for the knowledge and authority they bring. Include somebody who understands the customer task, somebody who operates the current service, somebody who can assess technical and data constraints, and the person accountable for the product decision. Assign a facilitator who can keep the discussion moving and a recorder who can preserve evidence, decisions and unresolved questions.

Send a short preparation brief containing the proposed audience, the observed problem, the business context and the decision to be made. Ask participants to bring a small number of relevant records: recent support issues, observations of the task, process timings, transaction failures, commercial enquiries or existing technical constraints. Remove personal information that the group does not need.

Check that the material describes a problem that customers or operators experience. A preferred feature, a competitor screenshot or an executive suggestion can start a discussion, but the team still needs to establish what outcome the product must improve.

02 / FACILITATION

Workshop running agenda

Each stage ends with a concrete output. The 150-minute schedule can be adapted to the decision and the group.

0-15 minutes

Confirm the decision and available evidence

One decision statement and an agreed boundary

15-35 minutes

Define the user and problem

A specific task, observed difficulty and consequence

35-60 minutes

Map the current task

The main steps, handoffs and points of failure

60-75 minutes

Surface assumptions

The uncertainties that could change the product decision

75-85 minutes

Break

The recorder consolidates duplicate points

85-110 minutes

Establish scope and trade-offs

Essential outcome, first-release boundary and exclusions

110-135 minutes

Plan investigations and address risks

Named tests, owners, decision criteria and constraints

135-150 minutes

Make the decision and assign follow-up

A recorded decision and a dated next review

Adjust the running time to the complexity of the decision. Preserve the sequence: the scope discussion should follow the problem and current-task work. If the team cannot establish the problem during the first stages, use the remaining time to plan the research needed to resolve it.

03 / PROBLEM FRAMING

Define the user and problem

Connect the task to observed difficulty

Give participants a few minutes to write their understanding independently. Ask them to describe who is attempting the task, what triggers it, what a completed outcome looks like and what currently gets in the way. Independent writing helps expose differences before the most confident voice establishes the group's answer.

Read the statements together. Replace broad audience labels with the characteristic that changes the task. A person's responsibility, experience, access needs, decision authority or working environment may matter more than a general demographic description.

Ask the group to connect each claimed difficulty to a record or direct observation. Distinguish the observed consequence from the explanation proposed for it. Repeatedly entering information is observable; the reason a person abandons a task may still need to be investigated.

Finish with a short problem statement that includes the task, difficulty and consequence. Keep proposed features in a separate scope area until the team has examined the current process.

Facilitation prompts

- What is the person trying to finish when this problem occurs?
- What can they do today, and where does the current route fail them?
- What evidence establishes the consequence?
- Which users are affected differently?
- What would change for the person if this problem were resolved?

04 / CURRENT STATE

Reconstruct the current task

01

Trigger

What starts the task?

02

Action

What must happen and who owns it?

03

Completion

What confirms a usable outcome?

Trace actions and responsibility

Choose a recent task or transaction that the participants can trace. Map the trigger, actions, decisions, information exchanges and completion event. Include staff activity and offline work when they are necessary to deliver the outcome.

For each step, record the responsible person or system, the information required and the next owner. Examine waits and rework. A delay may arise because information is missing, a queue has no clear owner, an approval is required or a system cannot represent the current state. These causes lead to different interventions.

Include exceptions and dependencies

Draw the routine path first, then add one consequential exception. A rejected application, failed payment, unavailable service or missing document can reveal requirements that the successful path conceals. Follow the exception until the task is recovered, closed or deliberately handed to another service.

Ask where the product would change this process. Identify which steps it would remove, support, automate or make visible. Record the existing systems and people that remain essential. This exposes integration and operating requirements before the team becomes attached to a particular interface.

05 / UNCERTAINTY

Identify consequential assumptions

Demand and usability

An assumption matters when being wrong would change the scope, investment or decision to proceed. Review the opportunity through four questions:

Demand: does resolving this problem matter enough for the intended users to change their behaviour?

Usability: can those users understand the proposed route and complete the important task in their actual context?

Feasibility and operation

Feasibility: can the necessary technology, data and integrations support the required behaviour?

Operational viability: can the organisation deliver and support the outcome within its real constraints?

Choose the investigation for the question

For each consequential assumption, record what is currently known, what remains uncertain and the consequence of being wrong. Prioritise investigation where uncertainty and consequence are both material. A familiar technology can still create a difficult operational dependency; a popular idea can still lack evidence of demand. Assign the next investigation to the uncertainty. A customer interview can explain needs and workarounds. A task-based usability session can expose interaction difficulties. A technical spike can investigate an integration or performance constraint. A limited operational trial can reveal handoffs and support effort. State which question the chosen activity can answer.

Set the first-release boundary

Deliver a complete outcome

Describe the essential outcome the first release must deliver from beginning to end. Select a narrow enough audience, task or operating context for the team to deliver that outcome responsibly. A smaller set of features is useful only when the resulting service still works.

Group proposed capabilities into four decisions: required for the initial outcome, dependent on investigation, suitable for a later release, or excluded from the present scope. State the reason for each important exclusion. This makes the boundary usable when additional requests arrive during delivery.

Account for operation and recovery

Review the scope against failure and recovery. Identify permissions, data handling, support ownership, analytics, manual intervention and rollback needs. These may be essential operating requirements even when they do not appear in the principal user interface.

Make trade-offs explicit. If a team chooses a manual operating step for an initial release, record its owner, capacity constraint, reconciliation method and replacement trigger. If a dependency will not be available, decide whether the scope changes or the release must wait. Leave unresolved dependencies visible in the decision record.

07 / INVESTIGATION

Plan decision-making investigations

Question, method and evidence

Define the question, method, owner and evidence required for each investigation. Agree in advance how the result will affect the product decision. The criteria should be specific enough to prevent the team from treating every result as support for the original idea.

Include the participants, environment or data needed. Check that access is realistic and that sensitive information is handled through approved arrangements. Where an investigation cannot use the actual operating environment, record the limitation and the additional work needed before release.

Sequence the work and control risk

Keep the next set of investigations small enough to complete and review. Sequence dependencies: an unavailable integration or missing permission may need attention before a meaningful end-to-end product test is possible.

Review risks alongside the learning plan. Identify a risk owner and an action for problems that require immediate control. Record the remaining constraints that will influence estimation, such as procurement, security review, data migration, accessibility, external approvals or operating hours.

08 / DECISION

Record the decision and follow-up

01

Decide

Proceed, revise, investigate or stop.

02

Assign

One accountable owner for each next action.

03

Review

Set a date and the evidence needed.

Confirm the decision and objections

Read the proposed decision aloud. Ask the accountable owner to confirm whether the team is proceeding, revising the opportunity, commissioning further investigation or stopping work. When the group lacks the authority or evidence to decide, identify who will make the decision and what they need.

Capture disagreement that materially affects the recommendation. Do not erase a technical or operational objection because the majority prefers a particular feature. Connect the objection to the dependency, risk or investigation that can resolve it.

Publish the working brief

Publish the working brief promptly after the session. It should contain the problem, intended audience, essential outcome, scope boundary, important exclusions, consequential assumptions, investigations and decision. Each action needs one accountable owner and a review point. Use the brief in the next planning conversation so the workshop's decisions survive the meeting.

09 / WORKING RECORD

Discovery decision record

Keep the workshop decision and the work it depends on together. Use additional copies for distinct investigations.

Context and problem

Product opportunity and workshop date

Outcome and scope

Essential first-release outcome

Investigation and decision

Investigation, owner and decision criteria

Decision owner and participants

Included scope and explicit exclusions

Critical dependency and risk owner

User task, observed problem and consequence

Assumption that most affects the decision

Decision, next action and review date