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## DISCOVERY: THE FOUNDATION FOR A SUCCESSFUL PROJECT

*A White Paper*

### Overview

Recently I read a business book that the author said he nearly made a \$40,000 mistake on custom software. I would have liked to discuss this with the author on why it was a mistake. The ultimate goal with any software development company is to provide a customer with their perfect business solution. I wondered what the process was when they decided to have this software built. Did they do their due diligence and outline in detail what they were looking for or did they gloss over the detail and give

broader descriptions of what they want. When a company wants someone to build them a custom app they need to provide the development company with as much detail as possible.

In order to facilitate this, not only must the vision of the solution be clear and well defined, it must be communicated to the software developer with accuracy and detail.



gathering, clarification and the exchange of ideas and concepts, and frequently evolves the end product as developers present possibilities based on the software platform being used and the customer articulates their requirements and desires.

Additionally, the discovery phase allows both entities to learn each other's business practices and cultures, to define realistic expectations and tangible goals, to set mile markers with which to measure progress, and establish a schedule of future contact.

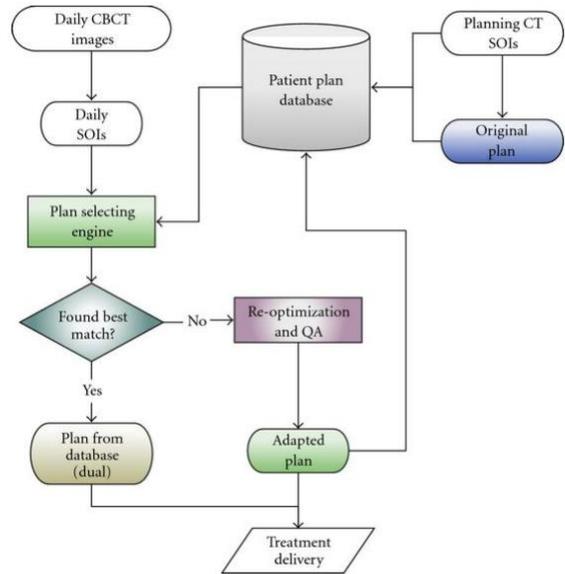
A solid discovery phase has the greatest impact on all other parts of the software development process.

## Discovery – a Prerequisite

Before a developer can begin crafting a business solution for their customer, the customer must relate what they are seeking in their business solution. This includes all business requirements, data capture, connectivity, interface features, and security needs to start with. Without this clear definition, the developer is forced to grope in the dark, basing their assumptions upon previous customers and experience, and frequently delivers an excellent tool that does not quite meet the customer’s needs. This leads to changes or clarifications that were not in the original scope of work, creating additional expenses, lengthened deadlines, and late delivery.

A successful project includes many elements, but those that relate to discovery and communication are:

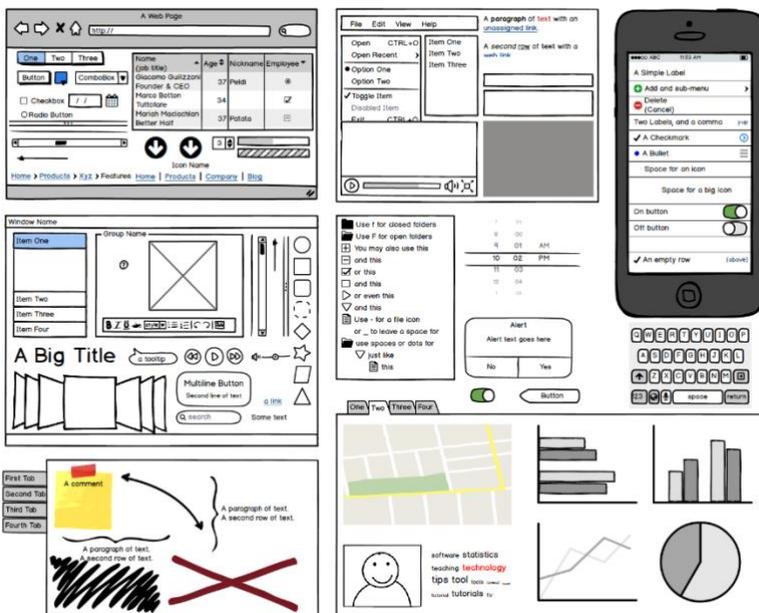
- A clear vision of the end product
- Initial, thorough explanation of the vision
- Feedback concerning the effects technology and procedure will have on the vision and development process
- Continued contact to refine the vision and enable course corrections
- A healthy working relationship between customer and developer



## Discovery – a Process

### Preparation

Almost certainly the discovery process has already begun, even before a customer reaches out to a developer. A need has presented itself, and the customer has begun to visualize a solution.



Sketching out ideas or visions is of incalculable value. Called “wireframes”, these illustrations need not be created in a fancy format – hand drawings are just as valuable as they allow the capture of more custom, direct representation of what is desired without needing to learn a special software or deal with limited shapes or images.

The more of your vision you can present to the developer, the closer the end product will match your desires.

One way to flesh out design is to think of a solution in six parts: collection of data, manipulation or processing of data, what security is needed, interface design, and reporting of data. Ask yourself How would the various screens or reports look like, is there a specific idea for navigation? What would a potential dashboard include?

### Presentation

The customer and developer should plan to spend time together crafting the “Scope of Work”. This document is the product of the discovery phase and forms the basis of the agreement between customer and developer to provide services.

Sometimes these meetings are little more than an hour or two, or for larger projects can span more than a day.

Whenever possible a face-to-face meeting will provide much greater benefits. Whether it is in your office or a video conference. The meeting should be held in a good place with the fewest interruptions possible. The use of a white-board, video equipment, or other presentation technology will often assist the process.



After some initial sharing that could include an introduction to the customer’s company and industry, the overview of the project and what it is to accomplish, and a display of any illustrations or wireframes, the meeting should evolve into a series of questions and answers. In this way the developer continues to learn about the project and the customer, and can put together a more accurate assessment of what will be required to fulfill the customer’s needs.

It is important that, after the discovery phase, both parties are as clear as possible on the objectives and goals for the desired business solution. All pertinent illustrations, a flow chart of navigation, a list of screens/layouts, a list of reports, and any special automation be clearly spelled out and included in the Scope of Work document.

## Proposal

If additional meetings or follow-ups are merited, they should not be overlooked or dismissed. By the end, a clear and concise agreement, based on the Scope of Work, should satisfy both customer and developer. This document should not only form the basis for a signed agreement to perform work, but an excellent reference manual to refer to as the project unfolds.

Without this solid foundation, the project is more likely to suffer from misunderstanding, misdirection, slowdowns, and extra costs.

## Discovery – in Conclusion

While every phase of the development process is important, the beginning of that process, the “Discovery phase”, has the greatest opportunity to have the most positive impact on the overall project. While the temptation can be to jump right in and see some quick progress, this planning phase is crucial to keeping work to a reasonable timeframe and financial budget.

Focused attention at the outset, eschewing distraction and shortcuts, not only reduces future distraction or costly digression, but sets a professional, appropriate tone for the whole project.

