

FREE RESOURCE

The Discovery Checklist

*10 Questions Every Organization
Should Ask Before Changing Anything*

A Discovery Nerd™ Resource

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Why This Checklist Exists

BEFORE YOU REDESIGN, RESTRUCTURE, OR ADD ANYTHING — PAUSE.

Most organizations are busy solving problems they haven't fully understood.

Before redesigning a process...

Before buying new software...

Before adding another meeting...

Use this checklist to identify where uncertainty, friction, and hidden work are shaping your organization. The answers won't give you a solution. They'll give you something more valuable — the right questions to take into your discovery work.

HOW TO USE THIS CHECKLIST

Work through each question individually or with your team. Answer honestly — not aspirationally. For yes/no/sometimes questions, circle your response. For open-ended questions, write your first instinct. Don't overthink it. The friction in your answers is the data.

The Discovery Checklist

10 DIAGNOSTIC QUESTIONS

1

Where does work actually begin?

Not where it's supposed to begin — where it actually starts.

☐ Clearly defined ☐ Sometimes ☐ Nobody really knows

2

Where does work slow down?

Look for handoffs, approvals, and moments where things sit waiting.

3

What decisions require the most waiting?

If a decision consistently takes longer than it should, there's a system reason.

4

What work exists outside documented processes?

The unofficial work is often where the real operating model lives.

5

Where do people rely on tribal knowledge?

Who knows things that aren't written down anywhere?

The Discovery Checklist

10 DIAGNOSTIC QUESTIONS (CONTINUED)

6 Which meetings exist because the system doesn't provide clarity?

Recurring sync meetings are often a symptom of missing information flow.

7 What gets escalated repeatedly?

Repeated escalations signal a decision that hasn't been assigned to the right level.

8 What information has to be recreated over and over?

If people keep rebuilding the same thing, the system isn't capturing it.

9 If one experienced employee left tomorrow, what work would become difficult?

This is your connective tissue question. The answer reveals your institutional risk.

10 Where are people compensating for the process instead of improving it?

Workarounds are solutions to real problems. Understand them before replacing them.

What Your Responses Might Be Telling You

READ THE PATTERN, NOT JUST THE ANSWERS

Mostly Confident Answers

Your operating model appears to be supporting the work. The system has enough clarity that people know where work begins, how decisions get made, and what's expected. Continue looking for emerging friction as the organization grows or changes.

Some Uncertainty

You likely have hidden operational costs — time spent recreating information, escalating decisions that should be resolved lower, or compensating for gaps in the process. There are real opportunities to improve clarity before adding new tools or restructuring.

Frequent Uncertainty

Your organization may be relying heavily on people to compensate for gaps in the operating model. The system is making good work harder than it needs to be. Discovery should come before redesign — understanding the current state before changing anything.

Almost All Uncertainty

This is a signal, not a judgment. It means the organization has outgrown its current operating model and is running on tribal knowledge, workarounds, and institutional memory that isn't captured anywhere. This is exactly where Discovery work begins.

Organizations rarely struggle because people aren't working hard enough.

They struggle because the system makes good work difficult.

Discovery Comes First

THE PRINCIPLE BEHIND THIS CHECKLIST

This checklist is not a solution. It's a starting point.

The questions are designed to surface where your organization has uncertainty, friction, and hidden work. Those three things — uncertainty, friction, and hidden work — are almost always at the root of why initiatives stall, why restructures don't stick, and why new tools don't solve the problems they were bought to solve.

Discovery is the act of making the invisible visible before you try to change it. It's not a phase you rush through to get to the solution. It's the work that makes the solution possible.

Principle 1

Experience helps you recognize patterns, not skip evidence.

The pattern is a hypothesis, not a conclusion. It still has to be validated.

Principle 2

Separate discovery from decision-making.

When discovery and decision-making happen in the same conversation, evidence becomes opinion.

Principle 3

Don't automate today's work.

Design tomorrow's operating model first. Discovery comes first. Design comes second. Automation comes last.

Ready to Go Deeper?

Discovery Nerd™ Field Kit 01

21 Rules for Organizational Clarity

The complete reference and reflection system for practitioners doing real organizational work. 21 rules. 5 categories. 5 reflection cards. Built for the work that actually happens.

Available now in the Discovery Nerd™ Etsy shop.

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