SCALEMORPH

# Systems Discovery Checklist

Questions before we write code.

A working sheet for your first conversation. Capture the bottleneck, the systems, and the first useful release â  then bring it to a call.

**01 / THE BOTTLENECK**

# Describe where work stalls

Bring a real example of the work, including the parts that did not go smoothly. A busy operating day usually tells more than a feature list.

â¢ Which workflow loses time or revenue?

â¢ Who owns it today, and who is waiting on the result?

â¢ What changes when volume increases or the usual person is away?

**Notes**

02 / THE SYSTEMS

# Map tools and handoffs

List the tools involved and identify where each record belongs. Note where people copy data, wait for approval, or investigate a mismatch.

â¢ Which tool is the source of truth for each record?

â¢ Which integrations, languages, and permissions are involved?

â¢ What happens when an integration or handoff fails?

**Notes**

**03 / THE FIRST WIN**

# Define a useful first release

Choose a change operators can put into use and a measure they already understand. Keep v1 small enough to learn from.

â¢ What would a useful first release change?

â¢ Which existing metric would show that it worked?

â¢ Who will operate, maintain, and own the system after launch?

**Notes**

Bring your answers to a discovery conversation: scalemorph.com/contact ´• contact@scalemorph.com