

Project Discovery Document

The *Project Discovery Document* is the first step in exploring an Information Technology solution to solve your business needs. All information submitted to our firm is kept confidential. This document is the starting point for our team's analysis.

Please be concise and specific when answering questions below. In addition, assign any order of priority to these technical processes or business rules. In short, paint a picture of how you conduct business as it pertains to this project. This information allows us to create a comprehensive proposal, allows you to analyze your business and ensures the long-term success of our relationship and project together.

Please fill out this document and return it by email (sales@albx.com) to your sales representative at Albanese Consulting. You will then receive a formal, written estimate or proposal for the project from our consulting team.

Organization

Please list the official organization name, year incorporated and parent company if applicable.

Nature of Business

Please give a general description of the nature of your business, including products/services, annual sales, grants, fiscal budget (*non-profit or government only*), types of customers, major competitors and geographic boundaries.

Goals

Please describe your organization's primary business goals.

Staff

Please give a synopsis of the technical, non-technical and contractual staff of your organization.

Decision Maker & Contacts

Please list the name, title, email, and phone of the decision maker and primary contact(s) that would be working on the project with our firm.

Project Basis

Is your organization seeking a proposal based on a project basis or a long-term contractual staffing basis?

Problem

Please give a description of the nature of the business/technology problem, as well as how it adversely affects your business, financially or otherwise.

Timeline

Please specify the date or timeframe in which you would like:

- Proposal completed
- Project started
- Project completed

Current Solution

Please describe your current technology solution in detail, including technologies, software, internal staff and vendors involved. Attach screenshots or printouts if possible and label accordingly for clarity.

Current Technology

Please describe in detailed bullet points the major technologies that your current solution uses. If no technology solution is being used, please state.

Project Goal(s)

Please list detailed bullet points of your project goal(s).

Desired Solution

Please describe in detailed bullet points the major functional areas that are required by a new solution. If a **web project**, please include a **preliminary sitemap** pointing out the main sections of the site and the functionality to be offered within each section. Please be as detailed as possible.

Desired Technology

Please describe in detailed bullet points the major technologies that you prefer the new solution to be built upon. For example, we prefer this solution to be built using a Microsoft SQL Server database system. If there is no preference or not sure, please state.

Modeling

Please include information for existing systems or sites that you would like to use as a model for this project. Some examples may be competitor/industry websites or existing prepackaged software applications.

Budget

Please provide a dollar amount that your organization has budgeted for this project in the current fiscal year or is prepared to budget for in the next fiscal year. If a budget has not been prepared, please provide an estimated range (\$5-10K, \$10-25K, \$25-50K, \$50-100K, \$100K+) that will be available. **This is REQUIRED.** A proposal will not be created without a budget figure.

Return on Investment

Please estimate an annual dollar amount that could be saved by your organization by the implementation of your Desired Solution. For example, if a solution were to save 250 hours of labor costs annually with an average rate of \$25/hr. per employee, your total savings would be \$6,250.

Possibilities

Has your organization investigated other software consulting firms and/or prepackaged software products to help you accomplish this business goal? In general, does your organization prefer prepackaged or custom developed solutions?

Maintenance

Will your organization maintain development, support and training related to this project after it has "gone live" or will it remain the responsibility of our firm? How often will changes be made to the project after it goes live?

Other Projects

Is this currently the only technology project in which your organization is seeking proposals?