

## Discovery Call Preparation

The purpose of the initial discovery call is to align with the client's requirements and set the expectations for the project delivery and high level solution functionality. This call can also be combined with the kickoff call then it's generally separate than the welcome call. The key stakeholders for each of the project's work streams need to be involved to ensure the entire project team has a common understanding of the timelines and requirements and end to end functionality. It also provides an opportunity to identify and discuss any potential planning issues before the project starts. To prepare for this initial discovery and/or combined kickoff call. The delivery team will need a clear understanding from the internal alignment phases of the key deadlines, project scopes and documents requested from the welcome call. Based on the deadlines and projected scope, the team can prepare the platform deliverables and the high level project planned slides. In most cases, the deadlines from the client may not be granular enough given their limited understanding of how the project will run, so the high level project plan should be prepared with the expectation that there will be changes while discussing these kinds of details with the client. Lastly, given the project scope and provided documents, a simple end to end connected solution walk through that can be simply prepared to help demonstrate each of the projects work streams.