

## Project Discovery Questionnaire – Analytical Models

*This questionnaire follows the **Requirement Analysis** phase of our SDLC. It ensures we build a solution that is robust, scalable, and tailored to your specific decision-making process.*

### Phase 1: Scope & Business Objective

1. **The "Why":** What is the single most important decision this model needs to support? (e.g., pricing a bid, assessing a merger, weekly cash management).
2. **The Audience:** Who are the primary users? Who are the primary *viewers*? (e.g., Data entry staff vs. Board of Directors).
3. **The Lifecycle:** Is this a one-off "Deal Model" or an "Operational Tool" intended to be used and updated for the next 3–5 years?

### Phase 2: Data Architecture (Inputs)

4. **Source Systems:** Where does the raw data currently live? (e.g., Xero/MYOB, Salesforce, manual logs, PDF invoices).
5. **Frequency:** How often will the data be refreshed? (Daily, Weekly, Monthly).
6. **Data Hygiene:** On a scale of 1–10, how "clean" is your current source data? Does it require significant cleansing, de-duping and/or transformation before it can be used?

### Phase 3: Logic & Structural Integrity (Calculations)

7. **Variable Drivers:** What are the key 3–5 variables that drive your business outcomes? (e.g., Headcount, Interest Rates, Input Commodity Prices).
8. **The "What-If" Requirements:** List 3 "Extreme Scenarios" you need to be able to simulate instantly (e.g., "What if we lose our 2nd largest client?").
9. **Known Constraints:** Are there specific "Business Rules" or regulatory formulas that must be strictly adhered to?

### Phase 4: UI/UX & Output Requirements

10. **The "Hero" View:** If you could only see one chart to know your business is healthy, what would it look like?
11. **Interactivity:** Do you prefer a "Dashboard" approach (interactive slicers/filters) or a "Report" approach (static, printable PDF summaries)?
12. **Control Level:** Do you want users to have "Full Access" to calculations, or should the engine be "Locked" to protect logic from accidental edits?

### Phase 5: Environment & Testing

13. **Technical Environment:** Which version of Microsoft 365/Excel is the standard across your organization?
  14. **Testing Protocols:** Who will be responsible for "User Acceptance Testing" (UAT) on your side to validate that the model matches your real-world outcomes?
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