DISCOVERY & STRATEGY

A discovery and strategy session is a half-day or full-day meeting deep-diving into a project and the underlying organization. It serves to formulate a solid plan of execution and align all stakeholders and vendors to ensure a successful project.

Overview and Notes

- Braid brings two members (usually a senior engineer and senior strategist) from our team.
- We lead the meeting; diving into the business, vision, and logistics of your organization and the project at hand.
- We saturate our team with a deep understanding of your organization and the project, hone your ideas, and offer an outside perspective. This greater context of understanding equips Braid to make better decisions on your behalf as we work.
- The meeting gives both our organizations a chance to evaluate one another before committing to a more significant project.
- We request that the key decision-makers for the project attend so we can effectively make critical feature decisions. If people can't attend the full day, we'd suggest the broadest audience before lunch, and the core project team after lunch.
- We will need 1) an internet connection, 2) a screen to present on, and 3) a whiteboard or large surface to diagram on. We can bring a projector for clients without a large screen.

Deliverables

I. Raw notes from the day.
II. Audio recording + transcription.
III. A "Key Findings" summary sheet.
IV. A proposal with an exact price, scope, and roadmap/timeline/phases, which you can engage Braid with or use to shop around.
V. Diagrams and wireframes produced during prototyping session (if applicable).

Cost

- Full day: $3,000 + the cost of travel
- Half day: $2,000 + the cost of travel

Agenda

The day is broken into three parts. We will work with you to determine which sessions are most valuable given time constraints of the meeting and specific project requirements.

- Exploration
    - Explore the project at a high level.
    - Identify stakeholders and target audiences.
    - Refine the goals and determine what key performance indicators will signify success.
- Strategy
    - Clarify the content strategy and information architecture.
    - Discuss design strategy, user experience and interfaces.
    - We address technology requirements: tech stacks, integrations, platform targets (web, iOS, Android, IoT), compliance, performance, and more.
- Prototype
    - We get in front of a whiteboard and get to work. This session can take many forms.
        - Produce wireframes of the website or app.
        - Diagram a user's flow through the application.
        - Refine the website's information architecture.
        - Map the tech infrastructure or any build processes.
        - List an organization's various software tools and plan how to integrate them to boost efficiency.