Qelv

Discovery and scope questionnaire

One place for every answer a project needs before it is priced. Fill in what you can; a blank is an answer too, and we go through the rest together on a call.

Sample · No client data · qelv.io

01 The problem

What happens today, step by step, and who touches it?

Where does it break, and what does that cost each week?

What would “working” look like, in one sentence?

02 People and decisions

ROLE	NAME	PART IN THE DECISION
Sponsor		
Day-to-day contact		
People who will use it		
Who signs off		

How is the decision made, and what would stop a yes?

03 Budget and timing

The budget range you are working with

- [ ] The budget is approved
- [ ] The budget still needs approval

When should it start, and is there a date it must be live by?

04 Compliance

Tick any that apply to the data this work will touch.

- [ ] GDPR
- [ ] CCPA
- [ ] SOC 2
- [ ] An NDA before details
- [ ] Data must stay in a region
- [ ] Other

05 Data sources

Tick every source the work reads from or writes to, and say who owns the login.

- [ ] Google Analytics 4
- [ ] Google Ads
- [ ] Meta Ads
- [ ] LinkedIn Ads
- [ ] TikTok Ads
- [ ] Klaviyo
- [ ] HubSpot
- [ ] Salesforce
- [ ] Mixpanel
- [ ] BigQuery
- [ ] Snowflake
- [ ] Redshift
- [ ] Google Sheets
- [ ] Excel files
- [ ] Other

Can you send a sample of the real data? When?

06 Measures

KPI	WHERE IT COMES FROM	TODAY'S VALUE

07 Roles and access

Who will use what you are building, and what each person may do.

- [ ] View only
- [ ] Edit
- [ ] Admin

Roughly how many people, in each role?

08 Refresh and alerts

How fresh the data has to be.

- [ ] Live
- [ ] Hourly
- [ ] Daily
- [ ] Weekly
- [ ] Monthly
- [ ] On demand

Who is alerted when something fails or crosses a line, and where (email, Slack)?

09 Version one

What must version one do?

What can wait for a later version?

What happens if you do nothing?

Send it back, or skip it

Reply with this filled in, or describe the work in a few sentences at **qelv.io/contact**. A free plan comes back within 2 business days.