Discovery Sprint Guide

About this guide

The U.S. Digital Service (USDS) works on technology improvement projects impacting people served by the United States government. Since 2014, USDS has partnered with dozens of federal and state agencies to build more than 160 successful digital products. In our initial interactions with a government agency, we will often run what we call a Discovery Sprint.

This guide intends to explain the discovery sprint process and share best practices to help teams adapt and run their own discovery sprints.

What is the purpose of a discovery sprint?

Discovery sprints are a useful method to quickly build a common understanding of the status of a complex organization, system, or service. They create paths toward solutions by identifying specific, actionable next steps for the people at the organization who will carry that work forward.

When we say "quickly" we mean that almost all of the work is completed in 2-4 weeks. A small cross-functional team of engineers, designers, product managers, procurement and subject matter experts partner with an organization's personnel to quickly explore an organizational problem or challenge.

> *The purpose of a discovery sprint is to identify root causes, issues, and opportunities, not to solve them in this time window.*

During a discovery sprint the team will interview stakeholders at every level of the organization as well as end-users. They will also dig into available data, look at code in production, and observe processes. As a methodology, discovery sprints are not new – they stem from best practices in Human-Centered Design. At USDS the organizations we typically engage with are federal agencies but, for this guide, we use the word "organization" as a placeholder for any group you would be doing your sprint work with. You can find definitions of other terms we use throughout this guide in the [glossary](#).

When is the right time to run a discovery sprint?

There's never a bad time to run a discovery sprint, though we typically see them happen during these different phases on a project:

- Before a new tool, service or product is built
- When an existing tool, service or product is actively broken, or no longer meeting current or aspirational technology standards
- When key stakeholders change and a fresh perspective is useful to plan for or prioritize a new roadmap

Discovery sprint scenario

Let's take the example of a federal agency somewhere. Your discovery team has been brought in because the process of filing paperwork to help people receive a benefit they are entitled to is "slow". One part of the Agency ecosystem is on the verge of spending $6 million on new servers in an effort to solve this problem. On the face of it, this looks like a pretty cut-and-dry technology problem. However, the agency leadership wants a gut check and has invited your team in to advise them. The discovery team spends time talking with the office that is making the decision to spend the money and, while they are there, they also spend time talking to the offices that are both up and downstream from the group that has brought them in.

It turns out that the team that is filing the paperwork at the beginning phase of the process waits one week for a response and then, if they haven't gotten an answer, they refile the paperwork again to "move the request to the top of the pile." They do this because the paperwork delay can result in people missing out altogether on receiving benefits. The discovery team then goes and spends a couple of days in the office that is receiving the paperwork. This group overhauled their workstream 9 months ago and they are now batch processing incoming requests three days a week. This has improved their processing time by a measured amount and they are extremely proud of this. They don't know why they seem to get so many duplicate requests though.

When your team talks to the citizens applying for the benefit, they learn that applicants find the paperwork onerous and the process of filling out the form, printing and signing the form, and scanning the document to be time consuming and confusing. If their information changes when they move, they have to start over from scratch because there is no way to make updates to an in-process application. Once forms are submitted, there's no easy way for someone to get status updates, or to know where they are in the queue.

In the scenario above, each team is absolutely doing as much as they can, to the best of their abilities for their stakeholders. In this case, the report written at the end of the discovery sprint can highlight the process of both teams, the struggles of everyday people trying to navigate the process, identify some opportunities, and make recommendations of what to do next. The report may also advise that spending money on servers at this stage is a solution that is unlikely to fix the challenges that the offices at the agency are facing.

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Preparing for the Sprint

Problem statement

Before the sprint officially begins at a kick-off meeting, someone will want to engage with the organization where the work will be done in order to develop a clear problem statement, identify stakeholders to work with, and set expectations.

> At USDS, a discovery sprint is often initiated at our leadership-level and then handed off once the sprint team lead is determined.

Sprint team lead

Identify your sprint team lead as early as possible since that person will serve as the main point of contact with the organization's leadership. Sprint team leads are responsible for stakeholder relationship management as well as preparing for and guiding the sprint team through every stage.

During these pre-meetings, work with your key stakeholders to come up with a concrete description of the problem the organization is facing. This helps to get a sense of the type of sprint it will be. It's also important to ask questions of the organization to clarify the scope of the sprint. The type of sprint—whether the organization is trying to procure or build software or if it is an emergency response to get an existing system back on its feet—will help ensure the right resources are on the team. It also makes sure that the team's focus is clear and helps with scoping the work for the sprint.

A good problem statement will include a description of the people at the receiving end of the tool or service, what they're trying to accomplish, and the implications for not addressing any known issues (number of people affected and how severely, budget concerns, etc). The problem statement should center around describing the issue rather than outlining any proposed solutions. For example, *"The organization wants to increase participation in vaccine trials related to a public health crisis. They currently have a 1% acceptance rate when they call participants. Even small improvements could dramatically speed up the vaccine development process and ensure that it is effective for all Americans. Improvements beyond the immediate crisis could also improve the organization's 22,000 ongoing medical trials."* The purpose of a discovery sprint is a new perspective, so it is entirely possible that the problems identified at this stage may not end up being the same as what the discovery sprint reports back at the end.

We break the rest of the preparation stage into three main components: staffing, planning, and kick-off. The sprint kick-off gets the organization and sprint team together to understand the organization's questions and sets expectations for the duration of the sprint.

Staffing

Because the intent of a discovery sprint is to put fresh eyes on an issue, a discovery sprint team should be made up of people who do not bear direct responsibility for solving any uncovered issues.

> At USDS, sprint staffing is done by the leadership team. A call will go out for volunteers who have an interest in participating in a sprint in general, a specific needed skill, or the upcoming sprint topic specifically. Due to other project commitments and responsibilities, it can sometimes be challenging to pull a team together quickly. As a rule, we try not to begin a sprint until the team is fully staffed.

The sprint team is the heart of a successful sprint. Sprint teams are necessarily small, usually 4-6 people. Sprint teams need to move quickly, often including actual travel requirements, and, the larger the team, the more communication and coordination is needed. The makeup of a particular team will depend on the specifics of the problem they will be solving. A typical team has the following skillsets:

- Project leadership (the sprint team lead)
- Product management
- Design expertise (e.g. user research, user experience, content, visual, etc)
- Technical expertise (e.g. engineering, systems, security, data science, etc)
- Policy or legal expertise (e.g. what USDS calls "bureaucracy hackers")
- Procurement knowledge
- Communication and presentation skills

Some individuals may possess several of these skills. For example, the sprint team lead might be a designer or the policy team member may also be a software engineer. The important thing is to ensure each skill is represented by at least one person. That said, we acknowledge that staffing is rarely perfect due to staff availability, so there may need to be some hard choices at this stage.

> At USDS, we do not have any teams that exist to only run sprints. Instead

we staff discovery sprints with people who are rolling off of larger or long-term projects. Doing this allows team members to focus on new work quickly. It's also an opportunity for cross-pollination by bringing together a needed set of skills to make up a strong sprint team. We also keep in mind that if a sprint turns into a longer-term engagement with the organization, we want to staff folks to work on things that they are passionate about.

Team cohesion

Once your team is staffed and decided on, you should get together before the kick-off. Get to know each other and who is good at what, decide what tools you will use for communication, swap contact info, and so forth. By the time you arrive at the kick-off meeting together you should appear to your partners and stakeholders as a cohesive and collaborative team with a strong leader.

- Practice your elevator pitch: make sure everyone has a consistent message of who the team is and why you're there
- Decide how you will explain what you do: many folks in the government will not know exactly what a product manager, UX designer, site reliability engineer, and so on do. How can you explain this to them without getting too technical?

Identifying your partners

It is important to note that sprint team members are often experts in their skill sets but not necessarily in the space being researched (the stakeholder organization or their challenges). It is imperative that, as the sprint begins, the team is able to partner with individuals at the organization that are subject matter experts to ensure the right solutions are being proposed.

The sprint team lead should work with the stakeholder organization to identify the following people:

- **Senior Executive Sponsor:** They provide high-level leadership support for the effort and receive the sprint deliverables. They will be instrumental in providing top-level support and often hold the responsibility for the solution and implementation efforts that will potentially follow. We often use the term "air cover" or "top cover" for this stakeholder.

- **Sprint Champion:** The sprint team's key day-to-day partner within the organization that's tasked with making this effort successful. Their work is affected by the problems that the discovery sprint team will be investigating.

- **Administrative Contact:** Someone with time dedicated to supporting the effort that the sprint team can interact with on a day-to-day basis to answer questions or get assistance with building access, booking rooms, office supplies, IT resources and other time-sensitive logistical matters. Access to a company directory and calendars is important for keeping a sprint from running beyond the allotted time frame. It's helpful if this person works for a senior stakeholder and is often tied to the Senior Executive Sponsor.

- **Topic Stakeholders/Subject Matter Experts:** An initial list of people inside the organization or adjacent to it who currently own a piece of the problem or the solution. This list will expand over the course of the sprint, as you uncover other people to talk to.

- **End Users**: The actual people who touch or who are affected by the tools/services in question. Inside the organization, "users" can refer to the internal team using enterprise tools, as well as the public, who will ultimately receive the services those tools provide.

Planning and sprint logistics

There are a number of arrangements and contacts that need to happen ahead of time to make a sprint run smoothly. The sprint team lead should work with the organization's partners to identify someone who can help coordinate logistics for the team.

Schedule

- **Timing:** Before you get too far into planning, make sure to discuss actual calendar dates with your primary stakeholders. Scheduling too close to a big annual meeting, the beginning or end of the budget cycle, or between Thanksgiving and the end of December when many people take extended vacation can kill a sprint's momentum.

- **Availability:** The entire sprint team should make sure that they have at least three consecutive weeks to dedicate full-time to the sprint. The first two weeks are often used for research with one week for follow-ups and writing, and another for final sprint delivery and readouts to stakeholders. Communicate the team's timeline to the organization's partners to ensure they are aligned and know what to expect. Keep a shared team calendar if possible.

- **Travel:** Confirm which team members can travel and make sure everyone has set up the appropriate travel accounts and documents prior to starting the sprint. Whenever possible, you should go to your stakeholders. If it is not feasible, read the section on remote sprints.

> One of the core values of USDS is, "Go where the work is." We have found that there is no substitute for going to where your discovery participants are.

- **Contacts:** Work with the organization's leadership to determine who would be best to talk to during the sprint. Ask for a high-level org chart annotated with contact information so the team can understand how the organization is structured. Note that, in government, the published versions of org charts are

often out of date.

- **Interviews:** Start by setting up initial interviews with critical stakeholders early on in the sprint. Scheduling often needs to happen well in advance since it can be hard to get on their calendars. Additionally, before the start of the sprint, schedule some user interviews for the first few days of the sprint so you can hit the ground running when it begins. As the sprint progresses, you'll continue to add to your interview calendar as you uncover more people to talk to. For more details on conducting interviews, see the [interview guide](#).

- **Final briefing:** Begin the process of scheduling the final briefing meeting where you'll present your results, as soon as you can. This helps immensely with a sense of urgency towards the conclusion of the research, the report delivery, and can organically help prevent scope creep.

Access

- **Building access:** Identify where the organization works. If there are multiple locations, get a physical map of where the organization is located to help everyone determine where they need to go. Everyone on the team should be able to access the organization's buildings. If interview locations are far from each other, you can try to be efficient for planning your interviews.

- **Workspace:** When working on-site it is helpful to obtain at least two rooms where the organization is located: one room for the team to work out of and one or more another room to conduct interviews, if needed. The team room is typically a large conference room where everyone can fit. This space should be reserved for the duration of the sprint plus a few extra days and should have the appropriate supplies: network access, whiteboards, post-its, paper, markers, etc. We typically recommend that you conduct interviews where the stakeholders sit and where the users are but having a back-up interview room helps if they're in an open floor plan.

- **Network / phone:** Work with the organization to determine how to get internet access. Additionally, some buildings have limited or no cell coverage so know ahead of time how the team will coordinate meetings.

> We've found that most federal agencies will not allow outside equipment to connect to their networks so tethering to phones or wifi hotspots might need to be employed.

- **Clearance:** Obtain any NDAs the team needs to sign in order to be effective and see all the work. This is often negotiable but planning for this beforehand allows the team to avoid having to make concessions about the scope of the sprint or getting held up before they can even start.

> Within government, a few agencies require security clearances before the team can start. The sprint team lead should work with the agency to determine what's needed.

- **Data / systems:** Collect any available background materials, technical diagrams, problem statements, and other materials relevant to the content of the sprint and distribute them to the sprint team ahead of time. Request access to potential systems and tools the organization uses that the sprint team might want to investigate.

Software and tools

- **Communication:** Make sure everyone on the team has everyone else's phone numbers and emails. Determine what tools the sprint team will use to communicate with one another and ensure that all sprint team members can access those tools.

- **Document repository:** Many sprint teams use Github to keep project documents. If so, create a team folder in the appropriate Github repo for the sprint team. If possible, some teams might be able to use Google Suite. Be careful about what happens to any sensitive information you may acquire, not only for the duration of the sprint, but what happens to it after.

The kick-off meeting

The kick-off meeting is the first time a large group comes together for the discovery sprint. It usually takes place in-person, to the extent possible, at the stakeholder's organization. In the room are the key stakeholders, all members of the discovery sprint team, and, most importantly, the executive sponsor from the organization. Ideally, a kick-off is 90-120 minutes to give time for both planning and discussion. The kick-off lets the sponsors meet the discovery team and to describe, in their own words, their current situation and refine the problem statement. This is meant to be a back and forth conversation, not a presentation-type meeting.

We include this first meeting as part of the planning stage because it needs to happen before the sprint begins. At the kick-off, it is essential for everyone in the room to hear the head of the organization reiterate that stakeholder interviews will be happening, that they are a priority, and that the effort is supported from the top of the organization.

A sample kick-off agenda

It is important to use the sprint kick-off to set sprint expectations and outcomes for the organization, stressing to them that the team is there to collaborate with them and provide an outside, neutral, 3rd-party assessment. You should help the organization understand that the team is engaging for a short amount of time and will use that time to meet with as many stakeholders as possible. What makes sprints so successful is that the result of the sprint is not an "audit" but objective observation followed by actionable information and recommendations for the organization's leadership to address the items

recommendations for the organization's leadership to address the items they've identified.

Here is an example agenda for the sprint kick-off:

- Introductions
- Organization's description of the problem
- Review of the "First 48-hours" proposed schedule of interviews
- A commitment to the dates on the sprint timeline
- Q&A from the sprint team to the organization
- Q&A from the organization to the sprint team
- What the organization should expect at the end of the sprint
- **Note:** We recommend setting the meeting date for your readout at the end of the sprint during the kick-off while you have the key stakeholders in the room. That way, scope creep is less likely.

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Conducting the Discovery Sprint

Part of having a successful sprint is your team's attitude from the start. Approach the work and the team's relationships within the organization constructively and positively. You'll be talking to many people and gathering as much information about the current state of the organization as possible. The meat of the sprint is two weeks of intensive work. It's crucial to stick to the two-week time commitment to keep everyone focused and the sense of urgency high.

> On rare occasions, depending on team size and resource availability, it may be appropriate to extend the length of the sprint a few days (for intensive usability testing or complicated travel, for instance), but it's important to look back to the goals of the sprint and avoid scope creep. You are not here to do a full project or to create solutions.

It is also important to figure out the sprint's north star and check in on this often. Otherwise, sprints happen so quickly that it's easy a team can lose sight of this. North stars are often a combination of organizational goals, team goals, and USDS values. Good "north star" targets are flexible enough to accommodate new information but fixed enough to serve as guidelines for if a particular interview or investigation path is worth the team's time. Ultimately, your north star should tell you what you are trying to accomplish with the sprint.

The discovery sprint is the start of a conversation with an organization to help them determine where to go. You are there help an organization look at something with fresh eyes and should be realistic about what you can accomplish in two weeks. Make sure to loop in your senior stakeholders to get their input on this as well. Lastly, as the sprint team uncovers more information, you should constantly refocus and reprioritize to respond accordingly.

It is the sprint team's role to uncover what the organization's needs are, understand the big picture, and provide recommendations that are realistic to achieve, taking into account what is actually possible for the organization to implement.

Sprint expectations

As a sprint team participant, be proactive and self-organize. The sprint team lead is there to help direct the team, but team members should take initiative and have the freedom to chase things down. The time on the sprint will move quickly and tasks can change daily – or even hourly. Schedules and meetings should be fluid to make sure you are using the time wisely for everyone involved. Patience, flexibility, and communication are key.

Here are some tips to keep in mind and revisit often while you are doing your research:

- Work from a learning mindset: you are there to learn from and enable your partners
- The organization has tremendous expertise and will have expended significant effort in this problem space already
- You are very likely not the first team that has shown up to help them on these issues
- They are also setting time aside for you on top of their other responsibilities
- Lastly, a reminder that the point of discovery is to look for the root causes and opportunities

It can be easy to fall back to a mode of just identifying all the problems and why they are harmful. It's easy for anyone to see the problems. There are often reams of paper and a big backlog that detail these shortcomings. This is only part of the work. The goal of the discovery sprint is not to add to that pile of paper. It's important to identify practical, pragmatic steps the organization can take to drive improvements and change.

Typical day

The bulk of each day will be spent meeting with agency stakeholders and users so begin and end each day with a team stand-up. Set goals and expectations and review the day's schedule in the morning. Recap accomplishments, discuss any findings, and plan for the next day in the evening. When you are moving and learning this quickly, staying grounded with your team is key.

Oftentimes, stakeholders want to know why they are talking to sprint members so being clear with your quick pitch will be helpful. During the day, build in breaks to keep the team in sync and for periodic sharing and reflections. Start a document where team members can add high-level notes and keep track of potential items to explore. The sooner you can get a rough framing of your findings, the easier the report writing phase will go.

Sample schedule

On Day One of the discovery sprint, the sprint team lead should have already pre-scheduled interviews with the organization's relevant stakeholders and users so that the team can get started right away. See the interview guide for in-depth details on how to conduct interviews.

The team is there to learn as much about the organization as possible. It's good to start talking with managers and leads, but also important to talk to individual contributors who are as close to the work as possible (engineers, contractors, analysts, call center operators, etc). You are there to respectfully surface areas for improvement, and, even more importantly, to look for ways to offer practical, tactical recommendations for how to achieve these improvements.

Beginning of Week One

- Start the day with a quick team stand-up, going over:
  - The schedule for the day
  - Who is doing what
  - Any blockers the sprint team lead should know
- Conduct individual interviews (leadership, stakeholders, staff, and users)
- At lunch, do a quick debrief and identify any changes going into the afternoon
- Conduct individual interviews, chasing down leads from the morning interviews
- End the day with another team debrief and setup for the next day

Middle of Week One

- Continue team check-ins throughout the day as above
- Continue interviews, requesting more, if needed, depending on findings
- Talk to and observe end users if possible
- Have the team brain dump everything you've learned in a structured way
- Start to formulate a hypothesis and surface areas where you still have questions
- Figure out who else you need to talk to and devise a plan to talk to them

End of Week One

- Continue team check-ins throughout the day as above
- Hold interviews with SMEs to answer any outstanding questions
- Continue talking to and observing people and processes
- Check in with key stakeholders to review findings to date; iterate as necessary based on their feedback
- Schedule interviews with additional people identified for the next week
- Brainstorm with the team on potential recommendations, using methods like affinity mapping
- Begin to structure findings and recommendations into an outline

> Remember that, while in some instances there's a clear path to a solution, the answer is not limited to technology. The team's job during the research phase is to review, not only the technology, but also the roles, mindsets, processes and policy.

Take time every day to share out what you've learned and discuss possible next steps. This will prevent the sprint from going down specific paths too quickly and is useful for re-focusing the team and providing concrete next steps. As you collect notes and interviews, themes will emerge that will help target your activities.

Ideally, by the end of the first week, you should have some concrete directions to chase down and should spend the second week more focused on those areas. Focus on getting as complete a picture as possible of the current state of the organization and the history that led up to it. Spend time understanding organizational dynamics and relationships, and identify decision points, pain points, and aspirations.

Beginning of Week Two

- Get together as a team to pull threads identified in week one
- Define the team's deliverables for the conclusion of the sprint
- Narrow in on a handful of findings that would make sense for the report
- Converge on areas to focus on for week two
- Continue interviews, following up on the key outstanding questions
- Begin to draft the report and presentation based on an outline from week one

Middle of Week Two

- Continue team check-ins to debrief and share findings and insights
- Update the team's affinity map of findings throughout the week
- Continue talking to and observing people and processes
- Start to figure out how to deliver your recommendations

End of Week Two

- Wrap up any outstanding interviews
- Determine the deadlines and outputs for the week three
- Check in with key stakeholders to review findings to date
- Iterate as necessary based on stakeholders' feedback
- Continue to refine the draft report and presentation

Once you have a good understanding of the organization and its challenges, you should tailor your approach to what makes sense for the organization. A project or initiative that is just starting is going to be in a different place than one that has a large backlog that needs to be resolved.

Regular reporting to your stakeholders

Part of the responsibilities of the sprint team lead is to maintain good communication with the team's stakeholders throughout the duration of the sprint. This can be done using whatever methods make sense for the people involved (phone calls, emails, etc). Daily and or weekly check-ins help keep everyone on the same page.

Remember that your senior stakeholders are the ones who will bear the responsibility of anything you discover as well as all the recommendations in your report. It's better not to surprise them. Interacting with them as true partners will help you set them up for success. Allowing a key stakeholder or two to see an early draft of your findings will give them the chance to weigh in on how to message some of your reporting in ways that their organization can hear, and that they themselves can prepare for. They may not always agree with you, but they shouldn't feel caught off guard either.

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Delivering the Sprint Findings

During the discovery sprint, your team will have amassed a lot of data in multiple types of formats. It is important to create artifacts of what was covered during the sprint as a "leave-behind" for your stakeholders. We recommend writing your documents at a level of depth that doesn't require you to be in the room with the reader. We've seen reports go dormant and get picked up later as the organization shifts in priorities.

Sprint deliverables

Typically, we produce some or all of the following deliverables:

- **An executive summary** (2 pages max) that identifies the sprint challenge and scope, the research the team did, and the high-level findings and recommendations. This is often shared with stakeholders in advance of the rest of the report.

- **A sprint report** (5 - 10 pages) that goes to the sprint stakeholders and organization's leadership. The report often includes the executive summary, observations, anonymous quotes, recommendations and potential next steps.

- **A formal slide presentation** (optional) that summarizes the report, since the findings are delivered in person to the same group of stakeholders that were present for the kick-off meeting at the beginning of the sprint.

- **A quick prototype** (depending on the organization's needs) may be created to illustrate a proof of concept. This is rare and will vary based on the scope and goals of the discovery sprint.

Make sure to leave a proper amount of time to create these deliverables as these will live on long after the team disbands. These items are the results of the sprint.

Start the first draft of the sprint report early

We have found that it's really never too early to start writing an outline or draft of your report deliverables. Even after the first couple of days of interviews you should start to have some good data and maybe an outline of the story that you will be telling. In your end-of-day team check-ins talk about what you saw and heard, what you learned, amd what you feel like you still don't know. Use those insights and questions to drive the next day's work. The sprint team lead should take notes that can become the start of an outline. During week two of the sprint you should start to write and edit your work.

A good discovery sprint report captures the current state of affairs, unearths gaps and opportunities, and sets clear recommendations for action moving forward. Recommendations should be actionable and address the severity of issues and potential impacts. The scope of the effort both in rough time and resources necessary should also be included for each recommendation. The report should also distinguish between things the organization could do now and long-term potential work. You won't have been able to dig deeply into every aspect of the organization during your 2 weeks, so it's fine to include unknowns and areas you would have liked to explore but didn't get a chance to.

Recommendations do not need to be technology fixes. Discovery efforts frequently uncover opportunities to move or empower existing staff or additionally hire missing roles or expertise (either directly or via vendor contracts). Organizational changes could be just as useful as building or buying more software or hardware. That said, government systems advance by the decade, so it is also possible that something that was an expensive custom-built solution, that hasn't aged well, may now be replaceable with off-the-shelf solutions. The other type of recommendation you may make are policy changes. This can happen for two reasons: one, available technology may have advanced beyond the limits of the current federal policy, and, two, over time an organization may be constrained by their interpretation of an existing policy and a fresh review may reveal new, potential approaches.

See the [writing guide](#) for in-depth details on writing the discovery sprint report.

Final report review

A fresh pair of eyes for a final edit is always recommended. Make sure that members of your leadership team review the final drafts of deliverables before they are considered "done" or ready to deliver. This can also include a review from the public relations, policy, or legal teams from your organization. Lastly, it's helpful to have a plain language expert review the report to ensure it's easy to read and understand.

> At USDS, we have occasionally run into situations where a sprint report can have unintended audiences or consequences. We now make it a best practice to loop in reviewers before we deliver the report to stakeholders.

Readout and presentation to stakeholders

Ideally the sprint team lead should have pre-scheduled the executive stakeholders for a readout meeting date as close to 3 or 4 weeks out from the kick-off date as possible. This will ensure that momentum stays high during the sprint and that the sprint team is able to deliver their findings while everything is top of mind.

During the sprint readout, walk through your findings, answer any questions the organization might have, and discuss next steps. You should print out a few paper copies to bring to the meeting. At the onset, make acknowledgments - thank leadership and the staff you worked with for their time and efforts.

You should then walk through what you did, your research, and how you came to the findings and opportunities. You should NOT walk through the report itself. Use this time to share stories that you heard during research to cement why you proposed the findings and recommendations. It is important that you understand where the organization is coming from and delivers the results of the sprint in a way that resonates with them. The research you have done should inform this.

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Wrapping up the Sprint

Once you have delivered a final report to your stakeholders, there still may be some things that need to be done to wrap up. Because of the transitional nature of project work, acknowledge and prepare for the fact that if further work is done coming out of the sprint, it may not be the individuals who were on the sprint team who staff any next step efforts. Make time to do some or all of the following activities:

Team retrospective

A team retrospective gives you a chance to reflect on the work that you did. Recruit a facilitator who wasn't involved in the sprint to run the retro. The entire discovery sprint team should participate. The retro should be blameless and give everyone a chance to have a voice in reflecting on the sprint. The session usually takes 90-120 minutes and is split into two parts:

- **Part One:** Spend the first hour recapping and telling the story of the sprint from beginning to end
- **Part Two:** Discuss what went well, what didn't go well, and any lessons you have for future sprints
- **End by answering:** Should our involvement with this organization continue? In what way?

Follow-up with the organization

The sprint team lead should keep in touch with the sprint stakeholders and partners after the sprint concludes and the report is delivered. Sometimes there might be residual meetings with the organization you engaged with. You may get asked to assist with something specific beyond the sprint or enter into conversations about longer project engagement.

Sprint presentation to internal leadership

Your organization's leadership may want a discovery sprint readout with the entire sprint team. During this time, you may be called upon to give recommendations about any further engagement moving forward. Leadership may want to know how to staff up a team to help the organization with implementing the recommendations found in the sprint report.

Sprint presentation to internal teams

This is the equivalent of a show-and-tell for your larger internal team. It helps everyone understand and talk about the kind of work that happened on the sprint and helps colleagues have some context if/when there is an ask for further staff to deploy on any further work driven by the sprint.

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Running Remote Sprints

One of the core values of USDS is "go where the work is" and we have found that there really is no substitute for going to where your discovery participants are. Whenever possible, you should do this. However, with the advent of a global pandemic, it may not be practical to put yourself or others in danger by traveling. We have found that while it is not the same, that it still can be valuable to run a discovery sprint if you can't go to your stakeholders. This section has some things to consider as well as some best practices if you have to be remote.

Develop good relationships as quickly as possible with your stakeholders

- You won't be able to walk around and knock on doors to get a full picture of the environment the way you could if the team was in person. Be creative with ways to connect with your sprint partners outside of the established meetings, such as taking advantage of the minutes before and after the agenda starts to make small talk.
- There may be situations where someone there will need to act as a proxy for you so opening lines of communication and setting clear expectations, especially about time, will be key.
- Work with your stakeholders to pre-plan as much of the schedule in advance as you can before the kick-off.

Use available tools
Figure out what meeting and collaboration tools are practical for the widest amount of people participating in the sprint.

- This may mean that you need to adapt to the tools they already use in order to prevent spending the first week doing more tech support than interviews.
- Most organizations will have some form of enterprise-wide tools that many of their people have access to like Webex, Zoom, Google Meet, Microsoft Teams, Skype, Slack, Mural, Miro, etc. If you can work with what they already have, it will make things easier for everyone.
- Try and avoid situations where an interview participant needs to download software to participate in a conversation as this can be intimidating to non-tech savvy folks.
- Note that government versions of these tools may sometimes be much more restrictive than you are used to, so always try to run a practice session beforehand to make sure everything works as expected.

Secure research artifacts
Going in you should have a solid understanding about who will be responsible for any recordings after you use them, where they will live and who will have access to them.

- It is easier and easier to record interview sessions using remote meeting tools as many of them have this functionality built in.
- This is especially a concern if you are screen sharing to look at a participant's work, or if their work reveals their (or a third party's) PII, PHI or other sensitive information.
- You and the team should consider up front what the potential trade-offs are for the topics you may be covering:
  - A test account, or dummy log-in information may be just fine to show you what you need to learn, without putting anyone's data at risk.
  - Single screenshots of a step-by-step process can be gathered before or after an interview session and even printed out and redacted then photographed or scanned by an interview participant.
  - Drawing or post-it type diagramming can be done collaboratively in tools like Mural or Miro, or even by someone screen sharing with a pen tool.
  - Think about what kind of artifacts you will need to understand their universe and get creative as needed to get there.

Interviewing
Most of the information in the [interview guide](#) will still hold true for remote interviews, with a couple of extra caveats. When running remote interviews it can be very tempting to open up the opportunity for more people to observe an interview with an end user. We advise against this due to the Hawthorne Effect, which is the alteration of behavior by the subjects of a study due to their awareness of being observed. Basically people get performance anxiety in front of a big audience. If you are using software that allows the interviewer to control the environment, it may still be fine, but one random observer who doesn't mute their microphone can quickly tank any trust you have built up during a session. We recommend curating the sessions much the same way as you would in person. If you decide not to record the sessions then have any extra observers be notetakers to keep busy. If you do record the sessions then members of the team can watch them asynchronously after the fact if they would like.

Thank your participants
It's harder to give sincere thanks when you can't look someone in the eye. Consider dropping a note to the interview participant's boss (you can CC them!) as a thank you note that will give dividends in the future. You can do this for in-person interviews too!

Writing the report

Most of the [report writing](#) process will be the same. Be sure to schedule some points for the team to sync in real time. Even if you're writing asynchronously or physically remotely from each other, it can be really easy for some parts to spin out while writing without regular check-ins.

Delivering the report
The report readout may be the one place where you may want to send an emissary or some of the team to be in-person with the stakeholders. If it is not safe to do so, then this is a situation where you may want to put the time in for a more polished presentation to accompany the report itself.

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When and How Sprints Can Fail

While it is rare that we see sprints completely fail, there are definitely some that are more successful than others. Here are some characteristics of the less successful efforts:

- No clearly defined sprint team lead
- Egos or strong personalities getting in the way of the work
- Not everyone is staffed to the sprint team before kick-off
- No members of the sprint team have participated in a sprint before
- Members of the sprint team are not fully dedicated to the sprint (time or attention)
- The sprint team is blocked in getting access to buildings/assets/people
- Timing of the sprint is poor (conferences, holidays, budget cycles, etc get in the way)
- The sprint team jumps from framing a problem to attempting to solve a problem
- Stakeholders are badly managed, or expectations are not made clear
- The air cover isn't high enough up, or doesn't exist
- Stakeholders are actively shifting
- The scope is too big, or poorly defined

During a very quick effort like a discovery sprint, it is easy for a team to get stuck in the weeds. When you are looking for information in an environment that is busy, complicated and unknown to you there can be seemingly endless things to "fix." Stay focused on what you have committed to do and if there are opportunities for other discovery efforts, write those down so you don't forget and just keep going.

Sprints can be very intense, and it can seem like a letdown if the stakeholders don't receive your report or recommendations with the same sense of urgency that the team feels coming out of the effort. It may take time for them to digest what you have delivered. This isn't failure, it's a normal adjustment phase. It is likely to be a month or two before next steps are addressed, and it can sometimes take a lot longer than that, especially in government. Often the organization will need to get funding, or hire subject matter experts directly or via contractor.

Further or continued engagement with the organization may not be necessary once a sprint is complete. They may have everything they need to move forward on their own, or they may use your report as leverage to get what they need without further direct support from your team.

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Glossary and Other Resources

Affinity mapping: This is a common user research method used to catalog data and group research findings into buckets and themes. See 18F's methods for [how to create an affinity map](#).

Agency: Most of the work that USDS does is done at federal agencies (Department of Health and Human Services, or The Social Security Administration are examples). For the purposes of this document we are using the term "organization" as a stand-in for federal agency to represent the place where the sprint is happening.

Air cover: The highest ranking person at the place where the sprint is happening. In the private sector, this would be the president of the company or a C-level executive. At a federal agency, this may be a Secretary, Administrator, Director, or a Deputy of one of those things. This is sometimes also referred to as "top cover."

Customers: This is a broad term used in the private sector to typically mean "someone who is paying money for the goods or services your company is providing." In most cases, where the government is providing something to the public, that service is free, so we more commonly use the term "end user."

Human-centered design (HCD): An approach to problem solving that involves the human perspective in all steps of the process, ensuring that the identified solution addresses the core needs of the people who are involved. This may seem like an overly obvious statement, but we often find in our discovery work that, because federal procurement has historically been requirements-driven, the technology and the people are out of sync.

North Star: The guiding principle or goal for your sprint and the key measure of your team's success. This should be set early in the sprint and referred back to as the work continues.

Organization: For the purposes of this document, we are using "organization" to broadly mean the place where the sprint is happening.

> At USDS, this usually means an agency in the federal government. The Department of Education, the Small Business Administration, or the Department of Homeland Security are all examples of places that we have done discovery sprints. However we know not all readers will be working at the federal level, so this may mean you are working with a state, a non-profit, an NGO, or some other civic entity.

Paperwork Reduction Act (PRA): A law governing how federal agencies collect information from the American public. Sometimes this is cited as a legal barrier against talking to end users during the research and interviewing phases of a sprint. It's normal to be nervous around this topic, but there is usually a way through to be found. In fact, we have always found a path forward in the many sprints that USDS has done over the years. More information about PRA can be found on the [PRA guide website](#).

Partners: Individuals within an organization that work with the sprint team. They may also be considered a stakeholder of the project.

PII/PHI: Personally identifiable information and personal health information

Stakeholder: This can have several meanings:

1. The organization or agency where you are conducting the discovery sprint
2. An individual person who is not on the sprint team, but who plays a key role or responsibility for the execution or outcome of the sprint
3. A primary stakeholder is usually the highest ranking individual ("air cover") at the place where the sprint is happening

Top cover: See "Air cover"

User or End User: Broadly used to mean the general public or a person on the receiving end of a government service. In the case of a discovery sprint, "end user" may refer to the government employee who is using internal software in order to provide a service to a citizen. For example, if the discovery sprint is looking into how the interface of a veteran's telephone hotline functions, then the call center operator would be considered a user as well as the veteran who is calling.

Other Resources

- [18F UX Guide](#)
- [18F De-risking Government Technology Guide](#)
- [18F Human-Centered Design Methods](#)
- [Paperwork Reduction Act (PRA) Guide](#)
- [VA.gov's Discovery Sprint Guide](#)
- [USDS Discovery Sprint FAQ by Kim Rachmeler](#)
- [Article: Government Discovery Sprints by Kathy Pham and Kara DeFrias](#)
- [Article: User Research in Government by Erie Meyer](#)
- [IDEO Field Guide to Human-Centered Design](#)
- [Google Design Sprints](#)
- [Gov.UK Design Principles](#)
- [Book: Interviewing Users by Steve Portigal](#)
- [Book: A Civic Technologist's Practice Guide by Cyd Harrell](#)

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Conducting interviews

Ideally, the team should talk to as many people as they can possibly schedule during the two-week research phase of the sprint. This section covers logistics and the process for stakeholder and end user interviews.

> **Note:** This section assumes that your interviews will be conducted in person which we recommend, however we also have a section on remote sprints if you are unable to travel to where your stakeholders are.

Laying the groundwork for successful interviews

At the kick-off it is important for everyone in the room to hear the head of the organization (or primary stakeholder) indicate that interviews will be happening, that they are a priority, and that the effort is supported by the organization. This will set the tone and help make the research phase go smoothly. If you have a member of the team who has a user research background, they should help drive this phase. If you don't, this is an area where you could bring in an expert, even just for an hour or two of prep, to help the team feel ready to interview people.

Before the interviews begin, sit down as a team and come up with a plan. List out what your goals are, what you want to learn, and come up with 5-10 core questions that you universally want to ask all of your participants.

DO: Get a point of contact from the organization to help you with whatever you need while you are there (building access, a work space, the wifi password, etc). This point of contact should have access to the organization's buildings and know the individuals you need to talk with.

DO: Pre-schedule as much as you can, but leave some open time blocks at the end of the day or the end of the week.

- You will discover new people you are interested in talking to
- You may need to reschedule people as things come up
- You may want to go back to an interviewee with more questions later on
- You can use any gaps in the schedule to collect notes and debrief as a team

DO: Plan to schedule most interviews for 45 - 60 minutes; 30 minutes is not long enough for an interviewee to warm up and get comfortable talking to you.

DO NOT: Schedule back-to-back interviews. You want at least 15 minutes in between each session. Don't forget to schedule lunch; you'll focus better if you aren't hungry.

- You will start late or run long a lot more often than you will ever finish early
- You may want to debrief or catch up with your notes between sessions
- It may take a minute to find the next office location if you don't know the building well
- Allow time for snacks and bio breaks

DO: Go where the person's desk is to interview them (this may involve travel). They will be most comfortable where they are familiar, and seeing their surroundings can help you learn all sorts of things and structure your questions. Avoid sitting in a conference room with people coming to you as much as you can, this can feel a lot like being sent to the principal's office for your interviewees and can get you off on the wrong foot before you even ask your first question. That said, in loud environments or large shared/open office spaces, you may want a quieter space set aside to talk to people.

DO: Whenever possible, stick to a ratio of one stakeholder to two sprint team members per interview. Multiple stakeholders can lead to groupthink, or the loudest or highest ranking stakeholder might do all of the talking. No one should conduct an in-person stakeholder interview alone, and more than two people can be very intimidating (and don't fit well in a cubicle). If the team is 5 people, two sets of interviewers and notetakers can work simultaneously, with the sprint team lead free to keep an eye on the schedule, the stakeholders and any other moving parts.

Interview Process

Arrive where you are going early, get settled, and make some small talk about the office or the weather.

Introductions

Do not make any assumptions that the stakeholder knows who you are or why you are there. Do assume they are nervous. The person who will be conducting the interview should start introductions and set the tone for the conversation, include the following:

- Thank the stakeholder for their time
- Introduce the team and discovery sprints as a concept
- Define the purpose of the conversation and create a safe space
  - *"We are here to understand who you are and what you do"*
  - *"We are not here to audit you or your work"*
  - *"We will anonymize your answers in the feedback we give"*

- Be clear that you are federal employees, not contractors, and that you are there to learn, not to "audit" them or their work
- Introduce yourselves and your roles
    ○ *"I'll be the person asking you questions today and my colleague Greg will be taking notes"*
- Specify timing
    ○ *"We'll be talking until 2pm today and we have a lot we want to cover"*
    ○ *"I may switch topics abruptly, but that's only because there are a few things I'd like to ask you about"*

Interview

One team member should ask the questions, while the other takes notes. Stick to those roles as much as you can so the stakeholder doesn't feel bombarded with questions.

Begin with some easy questions, this helps everyone warm up and builds trust.

Start by understanding who the person you're speaking to is, how long they've been there, and how they relate to the project. A suggestion for your first real question is to ask them to explain the whole system (beyond their piece of it) in their own words. This often surfaces confusion or disagreement about how things work. Don't assume any one explanation of a complex system is correct and never contradict a participant if you heard something different in another interview.

The interviewer will be working off of the list of questions that the team came up with. It's important to keep an eye on this list. If you have things you want to know from every person you are talking to, make sure to cover those, but it is not necessary to ask the questions in the same order every time. You will want to be flexible enough to adapt your language and questions to match what you are learning about the environment. For example, once you are familiar with their acronyms, it's ok to use them yourself as a gesture of understanding. When an interview is going well it feels like a conversation, there's a back and forth cadence that will happen.

Here are two very practical techniques you can use:

- The interviewer should make eye contact and talk 20% of the time. The stakeholder should be talking closer to 80%. The interviewer can keep an eye on the notetaker and give them the opportunity to catch up, or clarify as needed, when needed.
- When a stakeholder stops talking, the interviewer should pause and count to ten in their head before continuing. Sometimes the stakeholder might be thinking about their answer and you don't want to rush them, or interrupt their flow.

Wrap up

Try and end on a high note if you can, especially if you have spent a lot of the previous hour talking about things that are broken. These questions are good to ask as you conclude:

- *"If you had a magic wand and could change any single part of this process/system/role, what would it be?"*
- *"What is your favorite part of your job/your day?"*
- *"Who else should we make sure to talk to?"*
- *"If we have any follow up questions, is it okay if we come back to you?"*

Your Interview Participants

Approach each person that you interview as a subject matter expert in their work. They have likely been at their job for a while. For career government employees, this could easily mean 15 - 20 years. They will have good ideas about what's working and what isn't. Give them the space and the opportunity to share in their own words. *"How did you come up with this process or solution?"* is a better framing than *"Why don't you just do ____ ?"*

It's very possible that you are not the first team that has shown up in their office under the directive to help solve a problem, or help them "think differently." Give your stakeholders the opportunity to talk about what has been tried before, and how they individually thought it went.

Pay careful attention to your body language, and the body language of the stakeholder you are speaking with. If you are nervous, they will pick up on that and it will make them nervous, so aim for projecting competence and curiosity. You are always sending unconscious signals: leaning forward or back, arms and legs crossed or uncrossed, eye contact, frowning or smiling—it all matters in the room. Keep reading them and adjusting as you go.

Interview Logistics

When planning and conducting government user research, it is best to plan for the simplest experience possible. Use these very real world scenarios to help you plan:

Assumption: There will be no wifi or internet access where you are, and there may not even not be cell service.

- Do not rely on cloud based note-taking software
- Don't assume you will be able to communicate with other sprint team members electronically during interviews
- Members of the sprint team may not have access to the same collaborative documentation tools at the same time

Assumption: You will not be able to record interview sessions in any way.

- See PRA guidance and know the policies upfront
- You and your stakeholders have a responsibility to protect any personally identifiable information (PII) that you may come across as part of your

identifiable information (PII) that you may come across as part of your interviews

- Respect a "No" answer, but you can always ask politely:
  - If it's ok to take a photo of something relevant
  - For blank copies of forms or paperwork
  - For copies of powerpoint presentations, or cleaned up excel spreadsheets with PII columns removed
  - For training manuals
  - For any artifacts they would be comfortable sharing with the sprint team

If you have a team of 5, use 2 pairs of 2 for interviewing and leave the sprint team lead as a floater to mitigate office politics and the organization's dynamics as they come up. There are times when you may have to interview someone who the team doesn't think is relevant to the discovery process. Usually having this person sit down with the sprint team lead for 30 minutes can go a long way towards clearing a path for the rest of the team to keep going about their work.

Stakeholders can be very uncomfortable speaking ground truth in front of a boss or a manager. If this dynamic is happening, this is a place where the sprint team lead can step in with a request for help: *"Would you mind if we go (on a tour, back to your office, get a coffee, etc) and you can help me understand _____ better?"*

> **Note:** Sometimes your partner stakeholders may have concerns about how and with whom you plan to conduct research interviews, and they may say that doing this type of research is not allowed or even illegal in some cases. Depending on where you are, you may need to clear this misconception up before you are able to proceed further. Getting this worry uncovered and resolved as soon as possible will dramatically help you conduct the sprint more smoothly. If you have a ready answer for both you and your top-level stakeholders to reiterate during the kick-off meeting, it can save you a lot of delays if you get stuck later waiting for resolution.

> In US Federal government settings a common source for this concern is the Paperwork Reduction Act or PRA which can be confusing to interpret. We have some links about this in the resources section. Individual state governments may have their own policies, while academic and health-related institutions may have an Ethics/Institutional Review Board (IRB). The important thing is not to panic. Most of the people you are likely to be interviewing as part of your sprint will be internal or directly related to the organization you are working in service to, so you should be able to find a way to proceed that works within any concerns. That said, this is a case where having a lawyer, bureaucracy hacker or user research specialist on the team or able to consult can be very helpful.

Asking Good Questions

Going into every interview, the interviewer should have a list of 15 or so questions. Identify the top 5 beforehand in case time runs short, or you get too far off topic and you need to reset. Know that it's OK to ask questions out of order based on what the stakeholder is saying. It is also OK to iterate, add or remove questions as you start to understand things more deeply.

Not every question has to sound like a formal interview question. Ask open-ended questions that will encourage further conversation. You want to keep people talking so that you get the best possible picture of ground-truth.

Here's a list of key phrases and approaches that should be helpful:

Their education: Explore their training and background in the topic *"How did you learn about…?"*, *"What got you interested in…"*, *"Who taught you…?"*, *"How do you know/why do you know…?"*

History: *"Is this the way you have always done…?"*, *"How or why did it change?"*, *"What did you do before…?"*, *"How did this issue get identified?"*, *"What do you think about that now?"*, *"How have you/others tried to solve this problem in the past?"*

Sequencing: *"What happens before this…?"*, *"What happens after that…?"*

Interactive: *"Could you draw that out for me?"* (hand them a pen and a piece of paper) good for getting org charts, or the person's perspective on an existing process

Definitions: *"Can you say that acronym again?"*, *"We find that everyone means something a little different when they say ["agile", "cloud", etc, etc.] can you help me understand what you mean by…?"*

Superlatives: *"What's the most [inefficient, frustrating, expensive, worst] part of the process?"*, *"What's the [easiest, best, most fun, fastest] part of your day?"*

- **Note:** It is user research best practice that superlative types of questions should always be asked in their positive/negative pairings, otherwise it can seem leading if you only ask for *least* without asking for *most* as well.

Your education: Ask questions you think you already know the answer to and see what happens *"This may be a silly question, but…?"*, *"I never quite understood…"* this will help you curb any assumptions.

Active listening: *"Just to make sure I understand that…"* , *"What I heard you say is…"* This helps an interviewee feel heard, and makes sure you are representing them, or what you think they said.

Magic wand: *"If you had a magic wand and all the control, time and unlimited budget, what would you do/change/fix?", "Why did you pick…?"*

Remember that you are asking this individual for *their* truth. Even if you know, or suspect, that they are inaccurate, don't correct them in the moment. It will instantly change the trust dynamic between you, and you may not get that back.

> If you uncover something serious, like a major security concern, the sprint team can make the decision about what to do after the interview session. Sometimes this is an item for your report (cited anonymously). In rare cases you may want another stakeholder to know about something immediately, and that's for the sprint team lead, or sometimes even your organization's leadership to address.

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Discovery Sprint Guide

Writing guide

Brainstorm and outline

Draft and write

Edit and revise

Review and polish

Writing the report

Sprints almost always result in some final written product, typically a report (as mostly assumed by this guide), but occasionally design products, prototypes, slides, or even functional tools.

Depending on the schedule of the sprint, writing the report can take anywhere from three to five days. You should give yourselves the third week of the sprint to complete any final follow-ups and spend time compiling and writing the report, but starting this earlier is better.

Additionally, if this has not already been done earlier, carve out some time during this third week to schedule a readout session with the original leadership and stakeholders from the kick-off meeting, plus the most senior person who would be ultimately responsible for the initiative. The briefing shouldn't be a surprise to the organization, so the sprint team lead should also spend the third week pre-briefing them to get feedback and buy-in.

Prior to report writing, spend some time as a team getting on the same page about what done looks like and what should be delivered to the organization. Align yourselves on how you think the stakeholders or organization plan to use the report. It is also important to understand what role each team member will play during this phase and have an honest conversation about everyone's writing abilities. It helps to have some people dedicated as writers, some editors, and some to dig through the research from the past two weeks to find relevant content and quotes.

A common writing schedule looks like:

- **Monday:** Brainstorm and outline
- **Tuesday - Wednesday AM:** Draft and write
- **Wednesday PM - Thursday:** Edit and revise
- **Friday:** Review and polish

Brainstorm and outline

At the start of the week, spend the first half of the day brainstorming as a team and the second half solutioning and coming up with a high-level outline of the report. There should be a document that captures the team's hypotheses, thoughts, and observations from the sprint so far. Give yourselves some time to add any additional comments and thoughts from the last week, and to recall any high-level opportunities identified for the organization.

Once everyone has reviewed the findings the team uncovered the past two weeks, spend some time defining them. Affinity mapping is a good activity to help the team synthesize this information. The sprint team lead, designer, or anyone familiar with this method could facilitate. Give each person a pack of sticky notes and write down one idea per sticky for each prompt. Common prompts from past sprints include:

- What are the problems that have been uncovered?
- Who does this problem impact?
- For these problems, what needs to be considered?
- What is this organization doing well?
- What are the root causes behind what's not going well?
- What is our confidence level in the data we have gathered?

After everyone has answered the prompts, group similar ideas and then vote on the ones to be covered in the report. Prior to voting, narrow the groups down to a few key problems by identifying criteria that make sense given the organization: greatest impact, highest confidence in the organization solving the problem, etc. Give everyone a certain number of votes based on how many team members and how many ideas there, and allowed to vote on the ideas. Once this is done, discuss the outcomes and agree on the key problems and opportunities for the organization to focus on.

Do the same activity to come up with solutions. When this is completed, start to outline the report based on the results of the brainstorming. By the end of the day, assign each team member section(s) to write or edit and set a deadline for the first draft, usually the end of the next day or the next day and a half.

A suggested outline for a report looks like this:

- Executive summary (in memo format):
  - Problem statement
  - Key findings
  - A high-level overview of the recommendations (3-5 bullets max)
  - A footer disclaimer on every page that the report is "Pre-Decisional, Deliberative and Not for Distribution"
- In the rest of the report:
  - Detailed findings
  - Patterns you saw across the interviews and data/artifact reviews (use real quotes where possible)
  - Actionable content and next steps
  - Rough estimates of resources required (time, people, materials, etc)

Draft and write

Determine the type of environment everyone needs for heads down writing of the first draft. That may be remote time separately, together, or a mix. During this time, each team member should aim to write a first pass of a section they've been assigned, spend time sifting through the team's notes for applicable quotes or content for the sections identified, or following up on loose threads. The sprint team lead can pitch in where needed but should also focus their time on socializing some the initial findings and recommendations to the organization's leadership. This ensures the team is getting feedback, tailoring the report accordingly, and that the report's content is not a surprise to anyone when it is completed and shared.

> A good discovery sprint captures the current state of affairs, unearths gaps and opportunities, and sets clear recommendations for action moving forward. The result of a sprint may be a recommendation that this isn't a technical solution or that, while there are things that can be done with technology, they don't solve the originally stated problem. A finding like that is still a positive result for a sprint as long as it brings clarity to a formerly muddy situation.

The recommendations should be actionable and address the severity (low, medium, high) of the issue and the impact of the solution. The scope of the effort both in rough time and resources necessary should also be included for each recommendation. It is important to note that these recommendations are typically just first steps down a path and not a comprehensive plan. The report should also distinguish between things the organization could do now and long-term potential tasks. Also include areas you would have liked to explore if you didn't get a chance to.

At the end of the day, check-in to see how everyone is doing and the progress being made.

Edit and revise

As each team member finishes their section, someone else on the team should edit and revise their work. Once a full first draft is completed, have everyone read through and talk about what needs to be improved. Assign new areas to team members to read through and edit. The first draft should also be shared with others outside of the sprint to get feedback on the report from a fresh set of eyes. This is typically one or two people that's not on the sprint and has some writing, editing, and/or legal expertise.

During this time, also start pulling together the executive summary for the report. It is often helpful to write the executive summary after an initial draft of the report has been created to sufficiently summarize the report. The executive summary should be one to two pages and contain a high-level overview of the engagement, methodology used for the sprint, findings, and recommendations.

After feedback and comments are gathered, focus on incorporating changes. One person should be assigned to go through and edit the entire document to ensure consistency. Additional areas to review for edits include:

- **Content edits -** ensuring that all of the content discussed is included
- **Voice / tone edits -** that it reads cohesively, like it is written by one person
- **Grammar edits -** spelling is correct, sentence structure is consistent, and acronyms are explained
- **Organization edits -** the report flows from section to section in a narrative format

Review and polish

Do a final read, make final edits, and start formatting the document into the report template. It is also helpful to translate the report into a presentation to aid when delivering the report to the organization's leadership. Similar to the executive summary, the presentation should be high-level and short. If you decide to create a presentation:

- Avoid over-simplifying important things
- Fewer words = better; the report is the primary product and that's where the details should be
- Use a lot of pictures and quotes to humanize your findings where possible