



DISCOVERY & ANALYTICS BRIEF

Simple Planning Tool for SMBs, Startups
& Independent Consultants

A short guided questionnaire to see how your business actually operates — where time and information get lost, and what to improve next.

30–60 MINUTES · ALONE OR WITH A
CONSULTANT

What is inside

A quick map of the brief — 18 short pages, roughly 30–60 minutes to complete.

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How this brief works

A short, friendly tool to look at your business honestly. Use it on your own, or together with a consultant.

WHAT THIS IS

A simple brief to help you see how your business actually operates, where time and information get lost, and why some decisions feel slow or unclear.

The result: a clear foundation for improving processes, tools and analytics.

HOW TO USE IT

This is **not an audit or test**. You don't need perfect answers. An honest "I don't know" is useful and shows where to focus next.

The goal is simple: get a clear picture of your business.

WHEN IT HELPS

Tick anything that feels familiar:

- | | |
|---|--|
| <input type="checkbox"/> Decisions rely on gut feeling or spreadsheets. | <input type="checkbox"/> Information is scattered and hard to trust. |
| <input type="checkbox"/> People search or re-enter data. | <input type="checkbox"/> Work becomes messy as you grow. |
| <input type="checkbox"/> Too much depends on one person. | <input type="checkbox"/> Reporting is manual and slow. |

WHAT WE MEAN BY "DATA"

"**Data**" = everything you use to run the business — Excel files, CRM records, emails, chats, documents, invoices, customer records, photos, logs, etc.

HOW TO THINK ABOUT YOUR BUSINESS

Your business is a **flow of work**:

Leads → Sales → Delivery → Billing → Repeat customers

Inside this flow: information is created · decisions are made · delays and issues appear. This brief helps you see that flow clearly.

Three principles

These three principles frame the brief and guide the order of the questions.

01

Goals come first.

Know what you are trying to achieve before choosing tools.

02

Products and services define value.

Focus on what you deliver to customers, not on internal noise.

03

Tools serve the flow, not the other way around.

Systems should support the way you work — not dictate it.

The organisation as a flow of work

Reads from the bottom up: the foundation enables the work, the work creates information, decisions are formed on it, and the value flows out as business outcomes.



Work happens in the business. Information follows the work. Systems organise the information. Decisions are made from what becomes visible.

01

Business context

Build a quick picture of what your business does and where things are difficult.

Key questions

What do you sell? Describe the products or services in plain language.

How does the business make money?

Which functional areas does this work touch?

- | | |
|--|--|
| <input type="checkbox"/> Lead generation & marketing | <input type="checkbox"/> Sales & client management |
| <input type="checkbox"/> Delivery / operations | <input type="checkbox"/> Quality & process consistency |
| <input type="checkbox"/> Finance & accounting | <input type="checkbox"/> Customer retention & growth |
| <input type="checkbox"/> Internal management & admin | |

What decisions are hard to make today?

Where do delays usually happen?

What information is currently difficult to see or measure?

Where does your information currently live?

- | | |
|--|--|
| <input type="checkbox"/> Excel / Google Sheets | <input type="checkbox"/> CRM |
| <input type="checkbox"/> Accounting tools | <input type="checkbox"/> Email / chats |
| <input type="checkbox"/> Cloud drives (SharePoint, Drive, Dropbox) | <input type="checkbox"/> Other systems |
-

Your current setup, best guess.

- | | |
|---|--|
| <input type="checkbox"/> Mostly manual (Excel-based) | <input type="checkbox"/> Some systems, but not connected |
| <input type="checkbox"/> Reports exist but are inconsistent | <input type="checkbox"/> Central database / warehouse |
| <input type="checkbox"/> Advanced analytics / automation | |
-

02

How work actually happens

Focus: internal activities required to deliver products and services.
Describe the real workflow, from first contact to follow-up.

Key questions

Describe the workflow end-to-end. Example: *lead* → *proposal* → *contract* → *delivery* → *invoicing* → *follow-up*.

Which types of work are involved?

- | | |
|--|---|
| <input type="checkbox"/> Information (documents, data) | <input type="checkbox"/> Physical work (materials, logistics) |
| <input type="checkbox"/> Decisions | <input type="checkbox"/> Approvals |

Where does work stop or wait?

Where do queues form?

What slows the flow down most often?

03

Workload and dependencies

Where workload sits today: who carries it, what depends on individual people, what is repeated manually.

Key questions

Which activities or decisions depend on one person only?

What would slow down or stop if that person were unavailable?

Which activities require repeated manual updates, copying or reconciliation?

Where is information currently copied between systems by hand?

How many users work with the systems today?

- 1–5 5–20 20–50
 50–100 100+

How much manual work is involved in preparing information, reports or updates?

- Very little Some manual work
 Significant manual work Mostly manual

04

Communication

Where conversations happen and where information gets lost.

Key questions

Where does communication happen day to day?

- | | |
|-----------------------------------|--|
| <input type="checkbox"/> Slack | <input type="checkbox"/> Microsoft Teams |
| <input type="checkbox"/> WhatsApp | <input type="checkbox"/> Email |
| <input type="checkbox"/> Meetings | <input type="checkbox"/> Calls |
| <input type="checkbox"/> Other | |

Where are decisions actually made?

- | | |
|---|--|
| <input type="checkbox"/> In chats | <input type="checkbox"/> Email threads |
| <input type="checkbox"/> Meetings | <input type="checkbox"/> Calls |
| <input type="checkbox"/> Verbal / in person | <input type="checkbox"/> Other |

Are there verbal agreements that nobody writes down?

Do multiple versions of files float around? Where?

05

Resources, tools & information management

What is needed to do the work, where shortages occur, and who owns the official version of important information.

Key questions

What is needed to do the work?

- | | |
|---------------------------------------|--|
| <input type="checkbox"/> Information | <input type="checkbox"/> Access rights |
| <input type="checkbox"/> Templates | <input type="checkbox"/> Systems |
| <input type="checkbox"/> Integrations | <input type="checkbox"/> Other |

Which integrations between systems are missing?

Where is information missing, or hard to get to?

Who owns important information?

Where is the official version stored?

Who updates it?

What happens if that person leaves?

06

Security, continuity & risk

What would seriously affect the business if it were lost, exposed or stopped working.

Key questions

Which information would seriously affect the business if lost?

- | | |
|--|--|
| <input type="checkbox"/> Customer information | <input type="checkbox"/> Financial information |
| <input type="checkbox"/> Contracts and legal documents | <input type="checkbox"/> Operational records |
| <input type="checkbox"/> Intellectual property | <input type="checkbox"/> Other |

How are important systems and information protected?

- | | |
|--|---|
| <input type="checkbox"/> Automated backups | <input type="checkbox"/> Manual backups |
| <input type="checkbox"/> Backups exist but are not tested | <input type="checkbox"/> No backups |
| <input type="checkbox"/> Not sure where backups are stored | <input type="checkbox"/> Not sure |

What would stop the business from operating?

- | | |
|---|--|
| <input type="checkbox"/> Loss of internet access | <input type="checkbox"/> Loss of key systems |
| <input type="checkbox"/> Loss of a key person | <input type="checkbox"/> Loss of important information |
| <input type="checkbox"/> Dependency on external suppliers | <input type="checkbox"/> Other |

Which information requires special handling?

- | | |
|---|--|
| <input type="checkbox"/> Personal data (GDPR) | <input type="checkbox"/> Financial information |
| <input type="checkbox"/> Health information | <input type="checkbox"/> Trade secrets / IP |
| <input type="checkbox"/> Contractual restrictions | <input type="checkbox"/> Other |

What would create the biggest disruption if it stopped working tomorrow?

07

External dependencies

Where the work depends on people outside the organisation.

Key questions

Who do you rely on?

- | | |
|--------------------------------------|---|
| <input type="checkbox"/> Clients | <input type="checkbox"/> Suppliers |
| <input type="checkbox"/> Contractors | <input type="checkbox"/> Regulators / public bodies |
| <input type="checkbox"/> Partners | <input type="checkbox"/> Other |

What information or materials are exchanged with them?

Where do delays or issues with external parties happen most often?

08

Visibility, performance & decision-making

What you need to see clearly to manage the work and make decisions.

Key questions

Which of these are visible at a glance today?

- | | |
|-----------------------------------|--|
| <input type="checkbox"/> Workload | <input type="checkbox"/> Speed / turnaround time |
| <input type="checkbox"/> Quality | <input type="checkbox"/> Customer satisfaction |
| <input type="checkbox"/> Cost | <input type="checkbox"/> Profitability |

Is information visible at a glance, or assembled manually?

- At a glance
- Takes manual work to put together
- Mostly unclear

What should become easier to see or understand?

What should be visible that isn't today?

09

What you want to achieve

Define the deliverable of this specific project, and how you will know it worked.

Key questions

What should this project deliver?

- | | |
|--|--|
| <input type="checkbox"/> Reports / dashboards | <input type="checkbox"/> Better visibility |
| <input type="checkbox"/> Automation | <input type="checkbox"/> Better processes |
| <input type="checkbox"/> Clearer information structure | <input type="checkbox"/> System selection |
| <input type="checkbox"/> Roadmap / plan | |

What should measurably improve, or become easier or faster?

How will you and the team know the project succeeded?

10

Quick reflection, 2 minutes

Capture what became clearer in the act of filling this in. Often the most valuable answer is here.

Key questions

What became clearer while filling this in?

What surprised you?

What is still unclear?

What feels like the highest-priority issue to solve first?

Complete the sentence: *"The real problem we need to solve is..."*

11

Simple rule for choosing tools

Good systems reduce manual work, avoid duplicate information, and fit your actual way of working.

Key questions

A system is a good fit when it:

- Reduces manual work
- Avoids duplicate information
- Makes the work visible
- Scales as you grow
- Fits how you actually work
- Stays within budget
- Protects sensitive information

BUILD UNDERSTANDING

Leaders do not need to become technical specialists. However, understanding the basics of information architecture, analytics, automation and modern digital tools helps organisations make better decisions about systems, investments and change.

Good systems reduce friction. Great systems make good decisions easier.

Information Architecture Matrix

Core layers of information architecture mapped across the main functional areas of a typical SMB. A reference view — not every cell will apply to every organisation.

	Marketing	Sales	Operations	Finance	Admin	Quality	Retention
Business Activities	Campaigns, content, events, lead generation	Qualification, proposals, sales process	Project delivery, production, service execution	Invoicing, payments, contracts	Planning, coordination, administration	QA activities, reviews, standards	Account management, support, referrals
Information Flow	Leads, campaign results, content assets	Opportunities, quotes, client communication	Tasks, work orders, delivery records	Transactions, invoices, approvals	Internal communication, policies, plans	Audit records, quality findings, SOPs	Feedback, NPS, support requests
Systems & Tools	Marketing platforms, CRM	CRM, proposal tools	Project systems, documentation	Accounting / ERP	Knowledge base, collaboration tools	QMS, process documentation	CRM, support platforms
Decision Systems	Channel performance, campaign ROI	Pipeline visibility, forecasting	Capacity, delivery status, bottlenecks	Cash flow, profitability	Resource allocation, priorities	Quality metrics, compliance status	Retention, customer health, growth

Read across to see how one functional area is supported by each layer. Read down to see how one layer expresses itself across the organisation.

CROSS-CUTTING FOUNDATIONS

Security & Privacy

Protect information and manage access appropriately.

Information Ownership

Maintain clear accountability and a reliable source of truth.

Automation & Integration

Reduce manual effort and improve flow between systems.

Business Continuity

Maintain resilience and recover quickly from disruptions.



Brief complete

Typical next steps once the brief is complete:

- clarify priorities
- map key processes
- improve information flow
- define reporting needs
- evaluate systems and tools

START SMALL

Begin with a single MVP or pilot

one report · one workflow · one integration · one decision process

Quickly test the value before scaling.

You can continue internally — or use this brief as a starting point with a consultant.

GET IN TOUCH

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Confidentiality — the brief is treated as confidential. An NDA is available on request.

The goal is clarity — so you can make better decisions, faster.