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Subject: The Importance of the Discovery Phase

As we end this calendar and fiscal year, we at Incyte are faced with the daunting yet exciting prospect of new partnerships. Before we fully deploy Spearhead, our field management tool, we initiate a project discovery phase to make the best use of our team and our client's time.

Consider your discovery phase with a new prospect, vendor, or partner like a first date. You're learning about your intentions, ambitions, and expectations for the relationship going forward. Use those responses to develop a cogent strategy to gear everyone up for success.

Discovery looks different depending on the size of the company and the level of integration, but there are essentials to a productive process. Lay out the project, outline everyone's roles, and determine the parameters for accomplishment. Use transparency: When it involves new partnerships with a shared goal, it's important to get these things spelled out clearly.

When outlining your [discovery process](#), establish the following:

- Expectations are crucial for determining the viability of a project and gauging its success. Monitor that through mutually decided [key performance indicators](#) (KPIs) that are trackable and clear for all parties. If your goal is vague and indeterminate, that makes it difficult to communicate, especially when involving a big team.
- Establish **timelines** that everyone understands, along with key check points for milestones and check-ins. Once you've reached each one, lay out the next steps for what happens if it worked and what happens if it didn't. That way you can determine strategic pivots or when it's time for a victory lap.
- Whether a project is successful or just a learning opportunity, it's still important to document each step in the process. A [documentation strategy](#) ensures easy replication, pivots, and communication to a wider audience. Your meeting notes, strategic milestones, or document revisions – they're all helpful for reflection and duplication.

The intentional exchange of data, ideas, and strategy in those first few encounters outlines the work yet to come. As a business owner, leader, or even a contributing member of a team, use a clear order of operations to get everything started right.

[Reach out](#) to begin your own discovery process for your Spearhead onboarding today!

Incyte Energy Solutions