



GROWTH AND PLANNING

Client discovery workshop agenda

A workshop agenda for bringing the right people together to clarify the business problem, audience, constraints, decisions, and first practical priorities.

A practical worksheet from Stelaah

Use it, adapt it, and save it with the client work it supports.

HOW TO USE THIS

A client needs alignment before a project is scoped or planned.

WORK THROUGH THE CHECKLIST

☐ 01 **Set the workshop outcome**

☐ 02 **Invite the right decision makers**

☐ 03 **Frame the business problem**

☐ 04 **Map audience needs**

☐ 05 **Capture constraints**

☐ 06 **Agree priorities and next actions**

Before you close this

Name one owner, one next action, and one date. A worksheet only helps when the next commitment is visible to the people doing the work.

Notes and decisions

Use this page to record what changes after you work through the checklist.

This practical workflow resource is not legal, financial, tax, or security advice. Adapt it to your team and circumstances.