

Before we talk.

A project briefing checklist

Tick each item when you have a working answer. A short summary is enough to begin a conversation.

☐ **The decision**

What needs to change, and what decision do you need to make? Describe the problem in one sentence.

☐ **The scope**

Which team, process, project or location is involved? Note what belongs in the discussion and what does not.

☐ **The evidence**

What do you already know? List useful reports, observations or records, and mark anything that is missing.

☐ **The people**

Who owns the decision? Identify the people whose input or approval will be needed.

☐ **The constraints**

What dates, dependencies or resource limits matter? Separate fixed requirements from preferences.

☐ **The questions**

What must be clarified before agreeing an assignment? List uncertainties rather than assuming the answers.

Your working brief.

Use these spaces with your team. Keep the detail for a scoped discussion; start by sharing a short summary.

The issue and the decision we need to make

What a useful outcome would look like

What we know, and what we still need to establish

Who needs to be involved, and the next questions to ask

Ready to discuss the brief?

Start a conversation at capitalconsultingco.io/en/contact