

Needs Discovery Tool

Needs discovery is part of the Invent stage of scaling. This tool is designed to help researchers and developers gather the data needed to form an accurate understanding of end-user needs **and contexts**.

LEARN to Scale Toolkit

This resource is part of the LEARN to Scale Toolkit. The toolkit is designed to support researchers and developers in using the Invent-Apply-Transition framework to create, test, and scale evidence-based educational products. Access the full toolkit at learntoscale.org.

Identify stakeholders

Consider the questions below to brainstorm the stakeholders for your potential educational product.

- Who could be affected during the design and development?
- Who could be affected after the design and development?
- Who will have changes to their systems or processes because of this product?
- Who could have an interest in the outcomes of this product?
- Who approves the funding that could support this product? Who set the vision or goals for the use of that funding? Who approves changes impacting cost?
- Who could stop this product from being implemented?
- Who will benefit the most from this product?
- Who will approve functional or technical requirements of the product?
- Who will test the product?
- Who will use the product?
- Who represents organizational policies governing the use of this product?
- Who will manage the use of this product?
- Who will approve contracts for supplying the product?

Protocol development

The list of suggested questions and considerations below can be part of a protocol you use to interview potential stakeholders about their needs. The questions can help you uncover insights about the local context and identify actionable needs for your product design and marketing strategy.

Provide an introduction

- Explain why you are collecting data and how the data will be used.
- Provide an overview of the conversation and confirm that responses are voluntary.

Get the context

- Tell us about your position?
- What organization do you work for?
- What is your practice area?
- What are the relevant school/district demographics?
- What are systemic/ecosystem forces that are impacting your practice? Any recent shifts?

Needs hypothesis validation questions

- What is your organization (school district, school, school board) trying to achieve in the area of [practice]? What is the timeline for achieving the goal?
- When it comes to [goal] can you tell me what success would look like? What standards or indicators are currently used to measure performance against those desired outcomes?
- What components/performers (staff/departments/facilities/organizations) are most involved in achieving the goals specified above? What are their goals and responsibilities?
- What are the processes and tasks currently used to produce the expected outcome?
- What is the main challenge your organization faces when it comes to achieving your goal?
- How are these challenges impacting your day-to-day work and more broadly the organization you represent/work for?
- Are these challenge among the top priority areas for you and your organization?

- In your view, what are the possible underlying causes of these challenges? What performance/organizational problem is most important to fix in order to reach this organizational goal?
- How are you solving these challenges today?
- What is missing from existing solutions you use today?
- If you had a magic wand, what kind of solution do you want to see? What job tasks or resources and tools would you need to solve this challenge?

Present a high-level overview of the product concept

Potential questions to ask after presenting your potential solution/product. You may include these if returning to validate the need after you imagine a solution.

- Can you see your organization using the product every day? How would you use it?
- What is the main value you see in this solution?
- What is missing? What disadvantages do you see?
- What are the barriers for this product to be adopted in your organization?