

# Discovery Questions Cheat Sheet

For discovery conversations around file servers, cloud drives, and shared file access

## 1. Current Setup

**Goal:** Understand what they use today and how critical it is.

- How do your teams currently store and access shared files?
- Are you using a file server, cloud drive, or a mix of tools?
- Where is the main file repository hosted today?
- How many users access shared files regularly?

## 2. Access & Remote Work

**Goal:** Identify access friction and VPN dependency.

- Do employees need VPN access to work with shared files?
- How reliable is file access for remote or traveling staff?
- Do users work from multiple devices?
- Do users ever need access when they are offline?

## 3. Structure & Permissions

**Goal:** Reveal issues with folder structure and access control.

- How is your folder structure organized today?
- Do users know where files are stored, or is it confusing?
- How do you manage access when someone joins or leaves the company?
- Is access controlled per folder, or is it broader than needed?

## 4. External Users & Sharing

**Goal:** Understand collaboration beyond the company.

- Do you share files with external users like contractors or clients?
- How do you control what external users can see?
- Is access time-limited or manually revoked?
- Do you need visibility into what external users access?

## 5. Administration & Control

**Goal:** Surface admin workload and operational pain.

- Who manages users and permissions today?
- How much time does IT spend handling file access requests?
- Are permission changes simple or time-consuming?
- Do you have visibility into file activity when needed?

## 6. Reliability & File Behavior

**Goal:** Identify sync, performance, or file conflict issues.

- Do users experience sync issues or missing files?
- Are large or frequently updated files a problem?
- Do file conflicts occur when multiple users work on the same data?
- What happens if someone accidentally overwrites or deletes files?

## 7. Decision Triggers

**Goal:** Understand urgency and buying signals.

- What prompted you to review your current setup now?
- Are you planning to replace an existing file server?
- Are VPN limitations becoming a bigger issue?
- Is growth making file access harder to manage?

### How to Use This Sheet

- Use it during first discovery calls
- Use it to qualify fit before demos
- Use it to guide the conversation, not as a questionnaire
- Skip questions that don't apply; focus on patterns, not checkboxes

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