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Discovery-Driven Digital Transformation Success

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There's a graveyard most businesspeople don't talk about. Not because it's not right there, but nobody sends out any invitations.

It's full of digital transformation projects that cost millions, launched with a “Go-Live” party, and then quietly went away about six months later when the adoption plummeted. Portals that nobody logged into anymore. Self-service platforms that just forced frustrated customers to head right back to the contact center for help. AI-powered tools, the frontline team found so many creative ways around.



I've sat through enough project postmortems to know how it goes. There's almost always a point – usually late in the meeting, after everyone's good and exhausted – where someone says it quietly: ***"We thought we knew what they needed."***

That statement right there? That's your actual cause of potential project death.

Now, let's talk a little about the reality: every single one of those failed projects had a discovery phase. One person on the team had checked that R box. They scheduled and held workshops. They sent out employee surveys. They most likely gathered stakeholders for journey mapping sessions with the color-coded sticky notes covering an entire conference room wall.

The discovery happened. It just wasn't the right kind of discovery or yielded the right insights to build a plan on top of.

The data paradox

I cannot remember a time in business (in my career) where we've known more about our customers – and understood them less.

Think about what's sitting in your tech stack right now. Sentiment analysis. Net Promoter Scores. Session recordings. Heat maps. Forecast and churn predictions. Usage and adoption dashboards that update information in real time. If you printed it all out, you could bury a small town. And yet somehow, organizations are still launching digital products, portals, bots, and more that miss the mark so much so that it would be funny if the price tags weren't so high in the stratosphere.

Nobody wants to reveal this, but here it is: **data tells you what happened. The context tells you what it meant.**

Your analytics platform can tell you that 68 percent of users abandoned the onboarding flow at step four. What it can't tell you is why – whether they were confused, distracted, skeptical, felt something was wrong, or just got pulled into a meeting. That distinction isn't some minor detail. It's the entire ballgame. Because "redesigning step four" and "rebuilding trust earlier in the experience" are completely different problems. They also both carry a much different price tag, too.

Here is the uncomfortable truth: if your discovery process begins and ends with pulling a report, you don't really have a discovery process. You've got something closer to a confirmation engine – a sophisticated, expensive system for finding evidence that supports whatever you already knew. The dashboards aren't exactly lying to you. It's more like they are only telling you half the story. And half the story, in digital transformation, is how you end up in that project graveyard.

What real discovery looks like

Real discovery is a conversation. It needs to be an honest conversation, it needs conversational patience, it needs the right questions, and a real willingness to hear something that potentially fouls up your current plan.

That is how I think about discovery in two separate layers.

Layer 1 is the stated problem – what stakeholders tell you when you ask them directly. It's usually coherent, reasonably accurate, but almost never the whole story. Customers will tell you the app is confusing or not very intuitive. Some employees could tell you the new system causes their work rhythm to slow them down. None of these answers are fundamentally wrong. They're just too surface-level. And surface-level is where most organizations stop discovering and move on.

Layer 2 is the actual problem – what surfaces when you go deeper, past the polished complaint to the raw problems, issues, or challenges that are underneath the stated problem. This is where discovery gets more uncomfortable. This is the place where discovery gets genuinely useful.

I watched a hospital system spend considerable time and money getting ready to overhaul its patient portal application because the patient engagement numbers were low. The data showed a usability problem. Layer 1 discovery confirmed it to be true – patients did find the portal confusing. But when we kept asking, “why”, a different story emerged.

Patients weren't avoiding the portal because it was hard to navigate or not intuitive. They didn't trust what they found there. Specifically? They'd been burned by billing surprises before and want to deal with a system that might ambush them again. The interface was fine. The relationship was broken.

Those are not the same fix. A telecom client had something similar happen. Low digital channel adoption, and the working assumption was that their aging customer base was simply uncomfortable with newer technology. Layer 1 backed that up – customers said the app felt very overwhelming. But Layer 2 told the real story.

It wasn't the technology intimidating them. It was the tangled mess of family account management. Four lines, three different account holders, billing that made no logical sense whatsoever – customers weren't tech-averse, they were exhausted. Again, another completely different problem. Completely different solution.

In both cases, the data pointed in one direction. Discovery pointed in another. Deeper discovery was right.

The speed trap

There's a specific kind of organizational pressure that builds early in every digital transformation initiative. Budgets have been approved. RFPs were done. Vendors were selected. Someone high up made a promise to a board or to a leadership team about what's coming and when. In that environment, anything that looks like slowing down feels almost like going backwards. And discovery – with its open-ended conversations, scheduling conflicts, delays, and deliberately uncomfortable questions - looks exactly like slowing down.

So, the team feels the feverish need to go fast. Assumptions get treated like validated insights. The build of the project begins.

And that's precisely where the timeline starts working against you.

Here's the cost model nobody puts in the project plan: when you build on unverified assumptions, you don't save the time you skipped in discovery. You borrow it – at a very high interest rate. Every sprint your project runs in the wrong direction has to be unwound. Every feature built on a misunderstood need must be reworked or just abandoned. Every launch that lands flat requires a remediation cycle that costs more – in time, money, and even more organizational trust – than the original build did.

I've seen organizations spend six months in post-launch damage control on problems that two or three solid weeks of honest discovery would have surfaced before a single line of code got written or an integration was built. That's not some hypothetical trade-off I'm

making up. That's a pattern. And it repeats itself with remarkable consistency across industries, company sizes, and technology types.

The reframe that changes everything is this:

“Discovery isn't the enemy of speed. It's what makes speed responsible.”

Moving fast on a solid foundation? That's being agile. Moving fast on poor assumptions is just recklessness with better words attached to it. The organizations that consistently deliver successful digital transformation projects aren't the ones that are willing to skip steps to hit deadlines – they're the ones that front-load the hard stuff so that when they build, they build once, and build in the right direction, with the confidence that comes from actually knowing what they're solving for.

AI, stakeholders, and translation

Let me emphasize something here, because this is where a lot of business writing goes completely sideways: AI is not going to do your discovery for you. It will NOT replace the judgment call that comes from watching someone's expression shift when you ask the question they weren't expecting. It can't sense the long pause or even the hesitation before they answer or recognize that what someone didn't say matters just as much as what they did.

But (and this really matters) here's what AI can do: it removes the bottlenecks that have historically made deep discovery feel almost impossible at scale. It can help and provide insights faster to allow the team to analyze 100 percent of the issues, concerns, and challenges, because AI can go over everything and return the right information and the right types of insights to the team with incredible conversational discovery precision.

But here's the issue, and it matters enormously: AI only accelerates what you put into it. The quality and completeness of your discovery outputs are totally dependent on the quality of your discovery inputs. Shallow or pointed one-word answer questions produce poor insights, just at a much faster speed. But if you do a thorough job of creating exhaustive open-ended questions, with clarifications and follow-up points, then AI will give you a very high-quality report back. As an example, if you ask customers whether they're satisfied on a scale of one to ten? AI will work hard to give you a very efficient analysis of the data fed to it that still tells you almost nothing useful.

The irreplaceable element has always been the willingness to sit with ambiguity. To notice that an answer didn't quite land right and follow it somewhere off script. Be willing and ready to take a left-hand or a right-hand turn to get to the root cause. Let me expand on that here. You need to ask the follow-up question(s) that were not in the discussion guide because something in the conversation earned it. That instinct – the human curiosity that knows when to keep pulling on a thread – that's not something any model replicates. But if done right, this style of Discovery can yield incredible results for the organization.

And here's the stakeholder question most avoid until it's too late: Who was actually in the room when your last digital transformation initiative got scoped out? How deep was the

discovery process? How many stakeholders, users, or beneficiaries of this new project were interviewed?

If your answer includes a lot of senior leaders, a few department heads, some vendor reps, and the project sponsors who approved the budget – you've just described a very expensive echo chamber. Everyone in that room has authority. Almost none of them have proximity to where the actual friction lives.

There are people who know exactly where your digital experience breaks down. They're the ones nobody thought to invite. The support agents handling the same confused callback forty times a week. The nurse navigating three systems simultaneously because none of them talk to each other. The field technician who developed a personal workaround six months ago because the official process never actually worked.

Building the Bridge

Discovery without translation is just an expensive listening exercise. I've personally watched organizations do genuinely brilliant discovery work, rich conversations, honest insights, and real revelations about what customers and employees need. Then watch it all get packaged into a compelling presentation that gets a standing ovation in the boardroom and quietly collects dust on a shared drive.

The insights were well done. The impact was never realized. Because they never built a bridge between what the discovery work revealed and what they ultimately decided to do.

Raw, valuable, and actionable insights need structure before they can help to drive decisions. **That means taking what you heard and forcing it through a deliberate translation process** – identifying which findings represent genuine friction versus some small levels of inconvenience, which patterns appeared consistently enough to act on, and which assumptions your current roadmap is built on that discovery just blew up entirely. Every insight needs to earn its place by connecting directly to a specific feature, component, or build decision, a sequencing choice, or something that gets scrapped before it costs you anything more. The goal of discovery was never to create a great presentation. It was always to establish the foundation of a fundamentally different set of decisions.

The real competitive advantage in 2026

The companies that will win at digital transformation in 2026 aren't the ones that have the biggest budgets or the most sophisticated tech stacks. They're not going to be the fastest movers or the earliest adopters. The organizations consistently getting this right share a different quality entirely – one that doesn't show up on any vendor scorecard or capability assessment.

They're the organizations that are genuinely humble about what they don't know. And have built real systems and habits around shortening that gap before they spend a single dollar on closing any other one. They are also the ones who innately understand that the best data, the best insights come from those who have to live with and use the next system

eight hours a day. They are the personas well-versed in the good, the bad, and the ugly. A built-in focus group down the hall. Turn to them for real insights.

The technology landscape in 2026 is extraordinarily promising. The tools available to organizations right now would've seemed like science fiction a decade ago. But tools have never been the differentiating factor in transformation – judgment has. And judgment starts with understanding.

So, before you start your next digital transformation investment, set aside the dashboard for a minute. Stop asking whether you have enough data. Ask instead whether you truly understand the people behind the data you have collected terabytes on – their frustrations, their survival techniques, their workarounds, their needs and expectations, the trust they're extending every single time they engage with the digital experience.

If you can answer that question honestly and confidently, you're ready to build.

If you can't – well, you already know where the project could be headed.

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