



PREPARE FOR A USEFUL REVIEW

Product & technology review evidence checklist

Gather the evidence that could change your next product or technology decision. Start with what exists, make gaps visible and agree the depth of review around the business need.

20 evidence prompts. Eight areas. Start with the decision, then gather what exists.

How to use this checklist

- 1. Choose your starting point.** For a product-led review, begin with product/customer evidence and roadmap delivery. For a technology-led review, begin with architecture, resilience and release work. The shared sections help either review.
- 2. Record the evidence status.** Use Available, Partial, Missing or Not applicable. Add the owner, internal evidence location, open question and next review date in the editable CSV worksheet.
- 3. Make gaps explicit.** Missing records are a limitation to investigate, not a verdict on the team. A walkthrough can establish context without proving every assertion.

Keep preparation proportionate

Use redacted summaries or aggregated examples. Keep passwords, keys, personal customer data and proprietary code out of the worksheet. Agree secure access separately if a review proceeds. This resource has no upload or email requirement.

You do not need a complete evidence pack to begin. FoundationState starts with a free 1-2 hour discovery session to understand the pain points, then creates a bespoke proposal and quote.

Online checklist and editable worksheet

foundationstate.com/resources/product-technology-review-evidence-checklist/

This is a preparation framework, not an audit, certification or assessment result. The review depth and specialist testing are agreed separately.



01 | FOR EITHER REVIEW

The business decision

Start with the choice the review must support. Gather these first, whichever areas you examine.

Decision and deadline

Why: Keeps the review focused on an action leadership can take.

Gather: A one-page brief: whether to commit to the next release, change supplier or invest in the platform.

Likely owner: Business sponsor

If unavailable: Record the question, decision owner, deadline and consequences in a short discussion note.

Boundaries and upcoming changes

Why: Defines which products, systems, teams and dependencies need attention.

Gather: An agreed list of included systems, planned changes and known exclusions.

Likely owner: Business sponsor with product and technology leads

If unavailable: Draw a simple boundary map and list assumptions to confirm during discovery.

02 | PRODUCT-LED EVIDENCE

Product and customer evidence

Connect proposed work to a customer problem and a business outcome.

Customer problem and demand

Why: Tests whether priorities rest on evidence of a need.

Gather: A redacted research summary or an aggregated account of recurring support themes.

Likely owner: Product lead or customer-facing lead

If unavailable: Walk through the intended user task and record which assumptions still need validation.

Product priorities and success measures

Why: Shows how the roadmap is expected to help the business.

Gather: Current product priorities with the intended outcome, measure and reason for each.

Likely owner: Product lead and commercial sponsor

If unavailable: Write the intended change in customer behaviour or business performance; mark any unmeasured assumption.

Adoption and customer friction

Why: Distinguishes a shipped feature from a usable customer outcome.

Gather: Aggregated workflow usage, onboarding issues or a summary of adoption barriers.

Likely owner: Product lead with customer success

If unavailable: Use a guided workflow demonstration and a small, anonymised set of recurring issues; label the limits.



03 | PRODUCT-LED EVIDENCE

Roadmap and recent delivery

Use the same recent period for commitments, interruptions and completed work.

Current and previous roadmap

Why: Reveals what changed and who made the trade-off.

Gather: Two dated roadmap versions with reasons for material changes.

Likely owner: Product lead

If unavailable: Reconstruct a few significant commitments and confirm changes with the decision owners.

Planned and completed work

Why: Tests the assumptions behind available capacity and delivery confidence.

Gather: An anonymised summary of planned, completed, carried-over and unplanned work.

Likely owner: Delivery or engineering lead

If unavailable: Walk through representative work from decision to release; do not infer team performance from missing records.

Interruptions and dependencies

Why: Makes support demand, specialist constraints and external decisions visible.

Gather: Support and incident demand alongside the owners and status of critical dependencies.

Likely owner: Delivery lead with operations

If unavailable: List recurring interruptions and unresolved dependencies, separating estimates from recorded demand.

04 | TECHNOLOGY-LED EVIDENCE

Architecture and dependencies

Map the paths the business relies on, rather than producing a diagram for its own sake.

Critical systems and data flows

Why: Shows where a proposed change or failure could affect the business.

Gather: A high-level diagram of systems, integrations, data flows and business-critical paths.

Likely owner: Technical lead or system owner

If unavailable: Draw the main flows together and mark unverified connections.

Supplier and platform dependencies

Why: Identifies constraints on continuity, change and exit.

Gather: A summary of critical providers, operational owners, contract dates and exit questions.

Likely owner: System owner with procurement

If unavailable: Create a list of dependencies and owners; have the responsible person confirm terms separately.

Change constraints and technical debt

Why: Connects platform concerns to a decision about investment or delivery.

Gather: A prioritised set of recurring change bottlenecks with examples of affected work.

Likely owner: Technical or engineering lead

If unavailable: Demonstrate a representative change and distinguish observed constraints from suspected causes.



05 | TECHNOLOGY-LED EVIDENCE

Operational resilience

Understand how the business detects problems and restores critical services.

Recent incidents and response

Why: Shows recurring exposure and how operational learning reaches the plan.

Gather: Redacted incident summaries, impact, contributing factors and outstanding actions.

Likely owner: Operations or technical lead

If unavailable: Walk through a recent disruption and document what is known, unknown and still open.

Recovery evidence

Why: Tests the evidence behind a recovery expectation.

Gather: A dated restore or recovery exercise summary with result, scope and follow-up actions.

Likely owner: System owner or operations lead

If unavailable: Record the backup arrangements and proposed restore test; an untested backup is not evidence of recovery capability.

Monitoring and operational cover

Why: Shows whether important failures can be detected and acted on when the main owner is unavailable.

Gather: A high-level monitoring and escalation summary for critical services, with responsible roles and cover.

Likely owner: Operations or service owner

If unavailable: Walk through how an outage would be noticed, who would respond and which assumptions remain untested.

06 | TECHNOLOGY-LED EVIDENCE

Release and quality

Follow work through to a usable release, including checks and recovery steps.

Release path and checks

Why: Finds hand-offs or manual steps that affect release safety and timing.

Gather: A release walkthrough showing tests, approvals, deployment and rollback arrangements.

Likely owner: Engineering or QA lead

If unavailable: Document one recent release and the checks actually performed; mark undocumented steps.

Defects, rework and acceptance

Why: Shows whether completion includes customer acceptance and unresolved issues.

Gather: An anonymised sample of reopened defects, rework and release acceptance criteria.

Likely owner: QA, engineering and product leads

If unavailable: Trace a few recent issues from discovery to resolution; note where comparable records do not exist.



07 | FOR EITHER REVIEW

Ownership and accountability

Identify who can make decisions and who can operate the systems when a key person is absent.

Decision and operational owners

Why: Exposes gaps in accountability and reliance on individual knowledge.

Gather: A role-based map of product decisions, systems, suppliers and named deputies.

Likely owner: Business sponsor and functional leads

If unavailable: Build a responsibility map in a short workshop and record disputed or vacant responsibilities.

Administrative control and handover

Why: Clarifies who controls critical accounts and how continuity is maintained.

Gather: A redacted access-ownership summary, joiner/leaver process and handover responsibilities.

Likely owner: IT or security owner

If unavailable: List the roles controlling each critical service and what needs verification. Keep credentials out of the checklist.

08 | FOR EITHER REVIEW

Open questions and next decisions

Make missing evidence useful by connecting it to an owner and a decision.

Evidence gaps and conflicting accounts

Why: Prevents an assumption being presented as a verified finding.

Gather: A list of missing, partial or conflicting evidence and the decision each gap affects.

Likely owner: Review coordinator with evidence owners

If unavailable: Write each unresolved question, the best available account and what could confirm or change it.

Actions, owners and closure evidence

Why: Turns the review into a practical next step.

Gather: A short action list with accountable owner, dependency, review date and evidence of completion.

Likely owner: Business sponsor and delivery owners

If unavailable: Agree the first decision or investigation, who owns it and how progress will be reviewed.