

*not just*  
**ANOTHER COURSE**

A LEARNING PROJECT INTAKE & ALIGNMENT GUIDE  
FOR INSTRUCTIONAL DESIGNERS



# hi THERE

Before we build learning, we need to understand what we're actually solving. Too often, training gets created quickly... without asking the deeper questions first. Been there, done that.

So I made a guide to help not only myself, but YOU too, slow down... in a good way.

Use this guide at the very beginning of a project. You can walk through it on your own, or use it to structure a kickoff conversation with stakeholders and subject matter experts. Go old school and print this out so you can write in the answers or simply read the questions out loud and let your favorite AI meeting assistant record the answers... whatever works for you!

You don't have to answer every single question perfectly, but the more clarity you gain here, the stronger your learning solution will be.

Think of this as your front-end filter. If you get this part right, everything that follows: design, development, launch... becomes that much easier.

I'm here if you need me. You've got this.



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Need more help?  
Hit me up!



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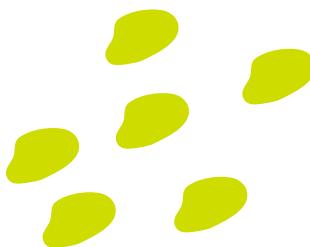
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# why are we **DOING THIS?**

See! We did all the  
hard work for ya!  
Just ask these  
questions in your first  
discovery meeting...



**What triggered this training request? (Performance issue, process change, compliance, new system, etc.)**

**What specific business problem are we trying to solve?**

**What evidence exists that this is a training issue?**

**What happens if we do nothing?**

**Who is asking for this training — and why now?**

**Is this a knowledge gap, skill gap, behavior gap, or motivation issue?**

**Could this be solved by something other than training? (Process, policy, tools, staffing, incentives)**

**What organizational goals does this align to?**

**What metrics are currently suffering?**

**What would success look like from a business perspective?**

**How will leadership define “this worked”?**



# who needs to change AND HOW?

**Who is the target audience? (Role, tenure, region, level)**

**How many learners are involved?**

**What do high performers currently do well?**

**What do low performers do incorrectly?**

**What exact behaviors must change?**

**What knowledge, skills, or abilities are missing?**

**What attitudes or beliefs may need to shift?**

**What constraints exist? (Time, technology access, language, literacy level)**

**What motivates this audience?**

**What frustrates this audience?**

**What prior training have they received?**

**What misconceptions might they have?**

# what are **WE BUILDING?**

**What core topics must be included?**

**What content is “nice to have” vs. “must have”?**

**What do high performers currently do well?**

**Are there policies, compliance rules, or regulations involved? What are they?**

What existing materials can be reused or updated?

What SMEs need to validate content?

How will learners practice the skill once learned?

What level of support does this initiative require? (Quick job aid vs. full curriculum)

What modality fits best? (eLearning, ILT, VILT, micro, blended)

Modality Psst! Use the Decision Matrix to help with this!  
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**How will learning be assessed?**

**Is this knowledge-based, skill-based, or behavior-based?**

**What tone should the training have? (Formal, conversational, brand-aligned)**



**Does the training need to be multilingual?**

**What branding requirements exist?**

**What creation tool will be used?**



# how will we deliver IT SUCCESSFULLY?

**Who is the project sponsor/main point of contact?**

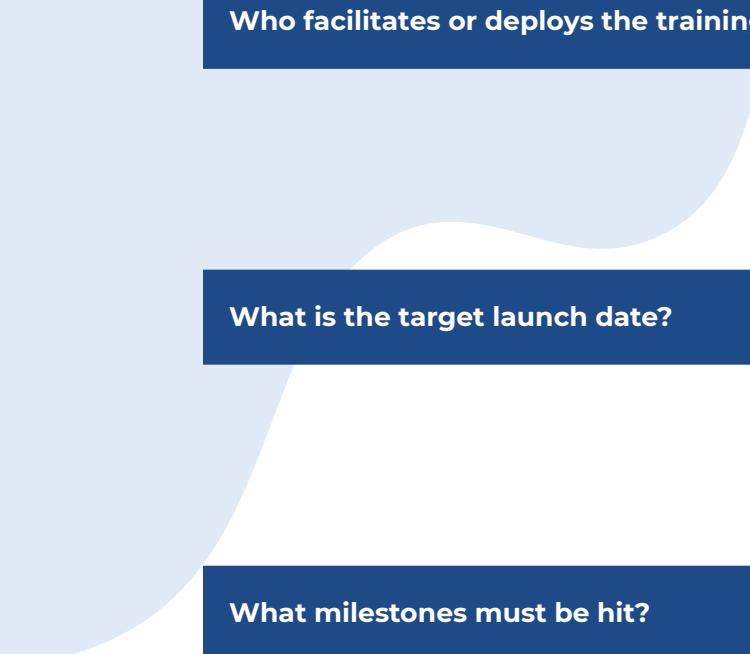
**Who are the SMEs (Subject Matter Experts)?**

**Who are the stakeholders?**

**Who reviews? Who approves?**



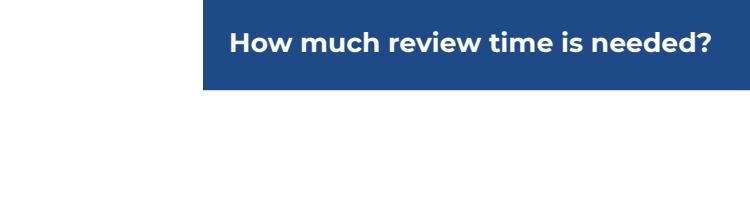
**Who facilitates or deploys the training?**



**What is the target launch date?**



**What milestones must be hit?**



**How much review time is needed?**



**What constraints could delay the project?**



**Are there any budget constraints we need to be aware of at this stage?**

**How frequently will this need to be updated?**



**How will learners access it? (LMS, mobile, classroom)**

**What communication plan supports launch?**

**How will success be measured post-launch?**

**What metrics will be tracked?**

**What is the engagement plan to ensure continued visibility (contests, etc.)?**

**What happens after launch? (Coaching, reinforcement, audits)**

**Who owns ongoing maintenance?**