Learning Project Discovery & Scope Plan

Use during the analysis / scope meeting to capture the problem, define the learning solution, and confirm what will be delivered.

1. Project Snapshot

Complete the basics before or at the start of the meeting.

Client / Organization *[Client name]*	**Project / Course Name** *[Working title]*
Primary Contact *[Name + role]*	**Meeting Date** *[MM/DD/YYYY]*
Instructional Designer *[Your name]*	**Target Launch Date** *[Desired date or TBD]*

2. Business Need & Performance Problem

Focus on what is happening now and what needs to change.

Business Need
[Why is this project being requested? What business goal, risk, change, or opportunity is driving it?]

Current Performance / Problem
[What are people doing now? What is not working? Include examples, errors, pain points, or consequences.]

Desired Performance
[What should people do differently after the solution? Describe observable behavior, not just "understand" or "know."]

Is Training the Right Solution?
[What evidence suggests a skill/knowledge gap? Note any process, system, policy, staffing, communication, or accountability issues that may also need to be addressed.]

3. Learner & Environment Analysis

Capture only what will affect design decisions.

Primary Audience *[Roles / groups / approximate # of learners]*	**Experience Level** *[New / experienced / mixed]*
Location / Work Setting *[Remote, field, office, classroom, etc.]*	**Access & Devices** *[Desktop, mobile, shared device, no audio, etc.]*

Prerequisites / Prior Knowledge
[What must learners already know or do?]

Accessibility / Language Needs
[Known accommodations, translations, captions, etc.]

4. Scope the Learning Solution

Agree on what is in scope before discussing every design detail.

- ☐ eLearning / WBT
- ☐ Instructor-led training
- ☐ Virtual instructor-led training
- ☐ Microlearning / job aid
- ☐ Video / animation
- ☐ Scenario / simulation
- ☐ Assessment / knowledge check
- ☐ Facilitator or learner guide

Estimated Seat Time
[Example: 20–30 minutes / TBD]

Delivery Platform
[LMS, website, Teams, live session, etc.]

Authoring / Production Tools
[Rise, Storyline, Canva, Vyond, HeyGen, etc.]

Tracking / Completion
[Completion, score, pass/fail, attendance, none]

In Scope
[List the specific topics, deliverables, audiences, features, and services included in this engagement.]

Out of Scope
[List anything explicitly excluded so it does not become an unplanned deliverable later.]

5. Content, SMEs & Source Materials

Identify what exists and who owns the answers.

Subject Matter Expert(s)
[Names + roles]

Content Owner / Approver
[Final decision-maker]

Existing Materials
[SOPs, decks, manuals, recordings, prior courses, links]

Content Status
[Final / draft / still being written]

Known Content Gaps / Questions
[What information is missing, outdated, contradictory, or still needs an SME decision?]

6. Learning Outcomes & Measurement

Keep this high level in discovery; refine after analysis if needed.

By the end of this solution, learners should be able to...
[List 2–5 measurable outcomes using action verbs. Example: Identify..., Perform..., Select..., Demonstrate...]

How Will Learning Be Checked? *[Practice, quiz, scenario, observation, no formal assessment]*	**Passing / Completion Requirement** *[Score, attempts, completion rule, N/A]*
Business Success Measure *[What result would show the project worked?]*	**Follow-Up Measure** *[Survey, manager observation, KPI, error rate, usage data, TBD]*

7. Timeline, Reviews & Responsibilities

Define the workflow so the project does not stall in review.

Discovery / Analysis Complete *[Date]*	**Content Ready** *[Date]*
Design / Prototype Review *[Date]*	**Development Review** *[Date]*
Final Approval *[Date]*	**Launch / Delivery** *[Date]*

Review Process
[Who reviews? How many review rounds are included? What is the expected turnaround time for feedback?]

Client Responsibilities
[Examples: provide source content, SME access, consolidated feedback, platform access, approvals.]

Designer Responsibilities
[Examples: analysis, design, development, project updates, revisions within agreed scope, final files.]

8. Constraints, Risks & Assumptions

Surface issues early instead of discovering them during development.

Constraints
[Budget, deadline, platform limits, brand requirements, compliance, tool restrictions, SME availability, etc.]

Risks / Dependencies
[What could delay or change the project? What depends on another person, system, approval, or content source?]

Assumptions
[What are we planning around that has not yet been confirmed?]

9. Decisions, Open Items & Next Steps

End the meeting with clear ownership.

Item	Decision / Question	Owner	Due Date

Scope Confirmation
[Summarize the agreed solution and immediate next step in 2–4 sentences. This can later feed directly into the proposal / statement of work.]

10. Approval to Proceed

Use this as confirmation of discovery notes, not as a replacement for a contract or statement of work.

Client Confirmation
[Name / date or "Confirmed by email"]

Instructional Designer
[Name / date]