Project Name/Number:
Client/Team Name:

Project Requirements		
	Question	**Response**
1	Who are the project stakeholders?	
2	What are the stakeholder's roles in the project?	
3	What parts of the project are the stakeholders accountable for?	
4	Which method(s) are best for communicating project updates with stakeholders?	
5	How frequently should we be in touch with stakeholders?	
6	Who are the key contributors/Subject Matter Experts (SMEs) to the project?	
7	What are the key contributors'/SMEs roles in this project?	
8	Which part of the project are key contributors/SMEs accountable for?	
9	Which method(s) are best for communicating with key contributors/SMEs?	
10	How frequently should we be in touch with key contributors/SMEs?	
11	Will this project require legal or regulatory approval prior to launch?	
12	What is/are the target date(s) for launch?	
13	What's the visibility of this project within the organization (e.g. Company-wide, Manufacturing Division, New Hires, etc.)?	
14	What's the terminal objective of this project? How will we define "success?"	
15	What measurement strategies and tools can we use to evaluate the effectivieness of the course/training product?	

Project Requirements		
16	How will the course/training product benefit the organization?	
17	What would be the impact on the organization if the course/training product wasn't implemented?	
18	What's the budget for this project?	
19	What kind of branding guidelines or styles should be adhered to (if any)?	

Discussion Tip
Plan ahead for reviews. Walk the client through your design & development process. Highlight points along the way where you'll be asking them to review the project and provide feedback.

Audience Needs		
	Question	**Response**
1	Who is the primary audience for training?	
2	Is there a secondary audience?	
3	How would you characterize the audience's skills: novice, experience, or expert?	
4	What is their educational background: high school, college, masters, doctorates?	
5	How diverse is the audience (i.e. age, ethnicity, cultural background, gender, age)?	
6	Do any of your learners have visual, audio, or physical impairments?	
7	How would you describe the audience's work environment (e.g., retail customer-facing, office, factory setting)?	
8	What does the audience do in a typical work day?	
9	What challenges do they face in performing their job duties? Will training help to address those challenges?	
10	How do they communicate with one another?	
11	How do they get help or support on-the-job?	
12	What types of hardware, software, equipment, or tools do they use on the job?	
13	How motivated/satisfied is this audience? What motivates and excites them?	
14	How much do they already know about the training subject?	
15	Have they been trained on this topic before? If so, how did they feel about that training? What impact did it have on their performance?	
16	What tone, voice, attitude, and language are most effective for connecting to this audience?	

Audience Needs		
17	How technically savvy is the audience?	
18	What level of participation do you expect from the audience?	
19	What does your audience expect to learn?	
20	How much time can your learners devote to training?	

Discussion Tip
Put on your performance consulting cap. Many training requests originate from the belief that training is the only way to make employees understand information. Increasing understanding may be important for achieving the objective, but ultimately changing employee behavior is how you'll impact performance.

Audience Behaviors

	Question	Response
1	What are the audience's behaviors today?	
2	What are the desired behaviors?	
3	Is there a gap between current and desired behaviors? If so, what's missing? If not, what are we hoping to accomplish with training?	
4	What desired behavior will we measure? How will we measure it?	
5	As a whole, what are the audience's strengths? What are their opportunities for improvement?	
6	What has the audience found challenging about training they've taken in the past?	

Discussion Tip

Focus on discovering why the desired results aren't being achieved. Identifying gaps in knowledge and skills are important, but there may be other factors effecting an audience's performance. Understanding the gaps between actual versus expected behaviors will help inform your recommendations for solutions—which may or may NOT include a course.

Content

	Question	Response
1	Is there source material we can work from? If so, in what form (e.g., Word document, PowerPoint slides, Excel spreadsheet, technical documentation, an existing course, etc.)?	
2	Can existing content be used as-is, or will we need to make changes?	
3	Is there missing content, yet to be created? If so, who will be responsible for creating that content?	
4	What kind of flexibility or creative license do we have for transforming or customizing the source content?	
5	Are there any creative treatments (e.g., comic-book-inspired, interactive video, etc.) you'd like to see? What about any creative treatments you'd like for us to avoid?	

Discussion Tip

Factor the state of existing content into the project timeframe. Understanding what form source content is in is helpful. But it's also a good idea to understand whether or not it's ready for use. For instance, content that's already been written for instructor-led training may not require as much re-writing; in other words, it's a little closer to being "ready" to go. Whereas content that's never been written for instruction (e.g., technical documentation or policies and procedures), means you'll need more time for rewrites.