Training & Development
Conversation with Training Project Stakeholder(s) Guide

Training Project Name: _____

Requested By: _____

Question	Why T&D Asks the Question	Notes
What issue are you trying to address?	• *Helps determine if request is in line with strategic business goals and objectives* • *Helps to determine if training is the solution*	
What is the goal/expected outcome of the project? • What should participants know or be able to do after training? • What behavior should change? • Does the project address compliance or regulatory requirements?	• *Helps determine if request is in line with strategic business goals and objectives* • *Narrows the focus of the discussion around the issue* • *Provides blueprint for development of the training solution* • *Helps identify any legally required information to be included in the training*	

Question	Why T&D Asks the Question	Notes
Who are the target learners? • Population size • Locations • Demographics and behavioral characteristics relevant to training	• *Helps identify who you are designing & developing for* • *Can determine what delivery method is appropriate*	
What resources are available for the project? • Subject Matter Expert (SME) availability • Existing materials (up-to-date, formats, location)	• *Determines if this is from scratch development (more time & cost)* • *Helps determine required resources & research*	
How would you like for training to be delivered? • Instructor-led (who will deliver training?) • Virtual, live delivery (who will deliver training?) • eLearning • Blended approach • Documentation/job aids • Time requirement for training length	• *Defines the stakeholder's vision for training* • *Helps to manage expectations if the vision is incompatible with reality (trainer availability, technology availability, etc.)*	

Question	Why T&D Asks the Question	Notes
How will you know if learning has taken place? • Formal assessment • Informal assessment • Observation • Metric tracking	• *Determines the type of assessment tools to be development* • *Determines if assessment takes place during or after training event* • *Determines responsibility for assessment*	
How do you define success for the project?	• *Defines return on expectation (ROE) or return on investment (ROI)* • *Helps define follow-up activities to cement learning* • *Determines the type and level of evaluation necessary for the training*	
What kind of tracking/reporting is required or desired for this training? • Completion • Assessment scores	• *Could impact delivery methods* • *Helps you manage expectations of what can be tracked in our LMS*	

Project Details	*Why T&D Gathers the Information*	Notes
Project Ownership • T&D Team Member • Stakeholder • SME • Other	• *Defines who has responsibility and/or accountability for the project*	
Training Development Schedule • Development timeframe • Review deadline(s) • Training go-live date	• *Helps plan T&D development time* • *Helps prioritize T&D projects by identifying urgency of need* • *Helps define level of commitment required of stakeholder/SME* • *Helps set and manage expectations for project completion*	
Sign Off Responsibility	• *Determines who has final sign off on the project* • *Helps in consideration of when this person should be looped into reviews and decisions regarding the project*	