

LEARNING PROJECT **INTAKE FORM**

IDENTIFY TRIGGERS OF CREATING LEARNING
PROGRAMS. GATHER ESSENTIAL INFORMATION TO
PLAN THE WORK.

GABRIELLE SUN

Learning Project Intake Form

This template is used **before the project kickoff** stage where you figure out the business problem, learning goals, logistics requirements, and existing resources.

Define the business goal	
What triggered you to make the training request? (e.g., to capitalize on an opportunity, to solve a problem, to support a strategy, introduce a new product, etc.)	
Define the learner	
Who are our audience?	
Tell me more about their daily responsibilities	
Is training attendance voluntary or mandatory?	
Delivery/Presentation	
What media formats will be used to deliver the information?	☐ vILT ☐ ILT ☐ webcast ☐ e-learning ☐ video ☐ Job aids ☐ other, please specify -----
Are there any expectations on the length of the course?	
What technology do the learners have access to? (e.g., Are we going to use LMS?)	
What are the expectations regarding when and how they will attend the training (during work, after hours, paid, unpaid)?	
Existing resources	
What existing performance data do we have (such as sales, productivity, quality, HR information, benchmarking, and so forth)?	
What existing training material do we have?	
How did previous training go (if applicable)?	
How can I gain permission and support for a needs assessment data collection effort to ensure the	

training will resolve the business and performance needs?	
Who are our Subject Matter Experts? Have they supported learning programs before? What does their time commitment look like?	
Timeline and Next Steps	
Discuss a high-level timeline	
Brief client on next steps and expectations	