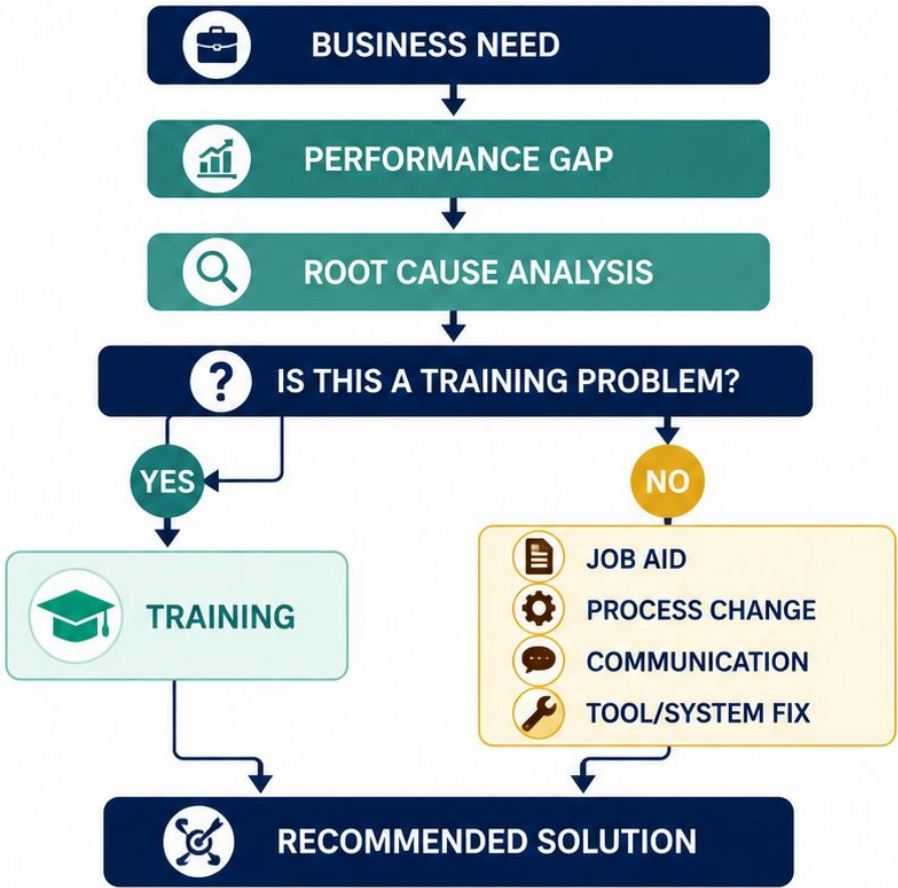




Learning Discovery & Performance Alignment Framework

A Structured Approach to Identifying Performance Gaps & Learning Solutions



SKILLS DEMONSTRATED

Needs Analysis

Stakeholder Consultation

Performance Consulting

Solution Mapping

Instructional Design

Identify the real need. Align the right solution. Drive performance.

Learning Discovery & Performance Alignment Framework

(Instructional Design / L&D Project Intake & Decision Checklist)

This framework supports structured learning discovery before solution design. It helps identify whether a gap is knowledge, skill, attitude, or process-driven — ensuring learning solutions align with performance outcomes, accessibility standards, and real workplace needs rather than defaulting to training.

Project Discovery & Documentation Checklist (Actionable)

1. Step 1: Analyze the Learning or Performance Gap (ADDIE): Determine whether training is the appropriate solution before designing instructional materials.

- ☐ Document the **stakeholder's original request** (in their words)
 - ☐ Identify the actual problem to solve and classify the gap:
 - Knowledge gap (don't know)
 - Skill gap (can't execute yet)
 - Attitude/motivation gap (won't or don't value it)
 - Environmental/process barrier (workflow, tools, leadership)
 - ☐ Could this be solved by:
 - workflow change
 - incentives
 - leadership expectations
 - tooling/system design
 - ☐ If people already know what to do but aren't doing it → escalate beyond training.
 - ☐ Ask: *What happens if we don't fix this?*
 - ☐ Define what **"success" looks like** in observable terms (behavior, efficiency, accuracy, confidence)
-

2. Design (ADDIE) Learning Objectives

- ☐ Identify the **primary audience** (role, experience level, environment)
 - ☐ Conduct short discovery interviews with 3–5 frontline performers.
 - ☐ Note where and when learning will be used (on the job, during onboarding, at point of need)
 - ☐ Clarify what learners **must do differently** after training
 - ☐ Identify constraints (time, tools, systems, compliance requirements)
-

3. Establish Learning Goals (Performance-First)

- ☐ Write learning goals tied to **real job tasks**, not content coverage
 - ☐ Is the goal **skill growth** or **process consistency/standardization**?
- If consistency → consider:
- walkthrough video
 - quick reference demo
 - onboarding asset
 - standardized process documentation
- ☐ Check each goal against the question: *Does this change performance?*
 - ☐ Remove any objective that exists "because we've always trained it"
 - ☐ Confirm goals with stakeholders before development

4. Select the Right Learning Approach

- ☐ Is this a point-of-need problem rather than a learning problem?
 - ☐ Would a job aid/checklist/decision tree outperform training?
 - ☐ Decide what **format best fits the goal** (eLearning, job aid, video, scenario, live session)
 - ☐ Match solution type to gap:
 - Knowledge → explanation, examples, concept models
 - Skill → practice, coaching, scenarios
 - Attitude → reflection, consequences, stories, social proof
 - Process → job aid or workflow change (may not require training)
 - ☐ Avoid defaulting to full courses when **microlearning or job aids** would work
 - ☐ Identify opportunities for **practice, decision-making, or scenarios**
 - ☐ Confirm accessibility considerations (WCAG, captions, readability)
-

5. Design With Feedback Built In

- ☐ Plan for **early learner feedback**, not just post-training surveys
 - ☐ Include reflection questions such as:
 - “What part of this was most useful?”
 - “What still feels unclear?”
 - “What would help you do this faster or better?”
 - ☐ Capture feedback during pilots or soft launches
 - ☐ Document recurring themes, not just individual comments
-

6. Measure Effectiveness (Beyond Completion Rates)

- ☐ Identify **qualitative signals** of success (confidence, clarity, fewer questions)
- ☐ Identify **quantitative indicators** when possible (errors, time, rework, tickets)
- ☐ Decide how effectiveness will be reviewed (manager input, learner feedback, metrics)
- ☐ Record what worked and what should change next time

7. Document for Reuse & Scalability

- ☐ Maintain clear documentation of:
 - Problem statement
 - Learning goals
 - Design decisions
 - Outcomes
- ☐ Capture lessons learned for future projects
- ☐ Store artifacts so they can be reused, adapted, or scaled
- ☐ Update documentation when content or workflows change

8. Reflect as an Instructional Designer

- ☐ Note what assumptions were challenged
- ☐ Identify what you would do differently next time
- ☐ Record new questions or insights about learner behavior
- ☐ Add this learning to your personal ID knowledge base

9. Evaluate Learning Effectiveness (ADDIE Evaluation + Kirkpatrick Levels 1–4)

- ☐ Collect learner feedback (Reaction)
- ☐ Review assessment or performance data (Learning)
- ☐ Observe changes in learner behavior or application (Behavior)
- ☐ Evaluate impact on desired outcomes or performance goals (Results)
- ☐ Revise content and learning solutions based on findings