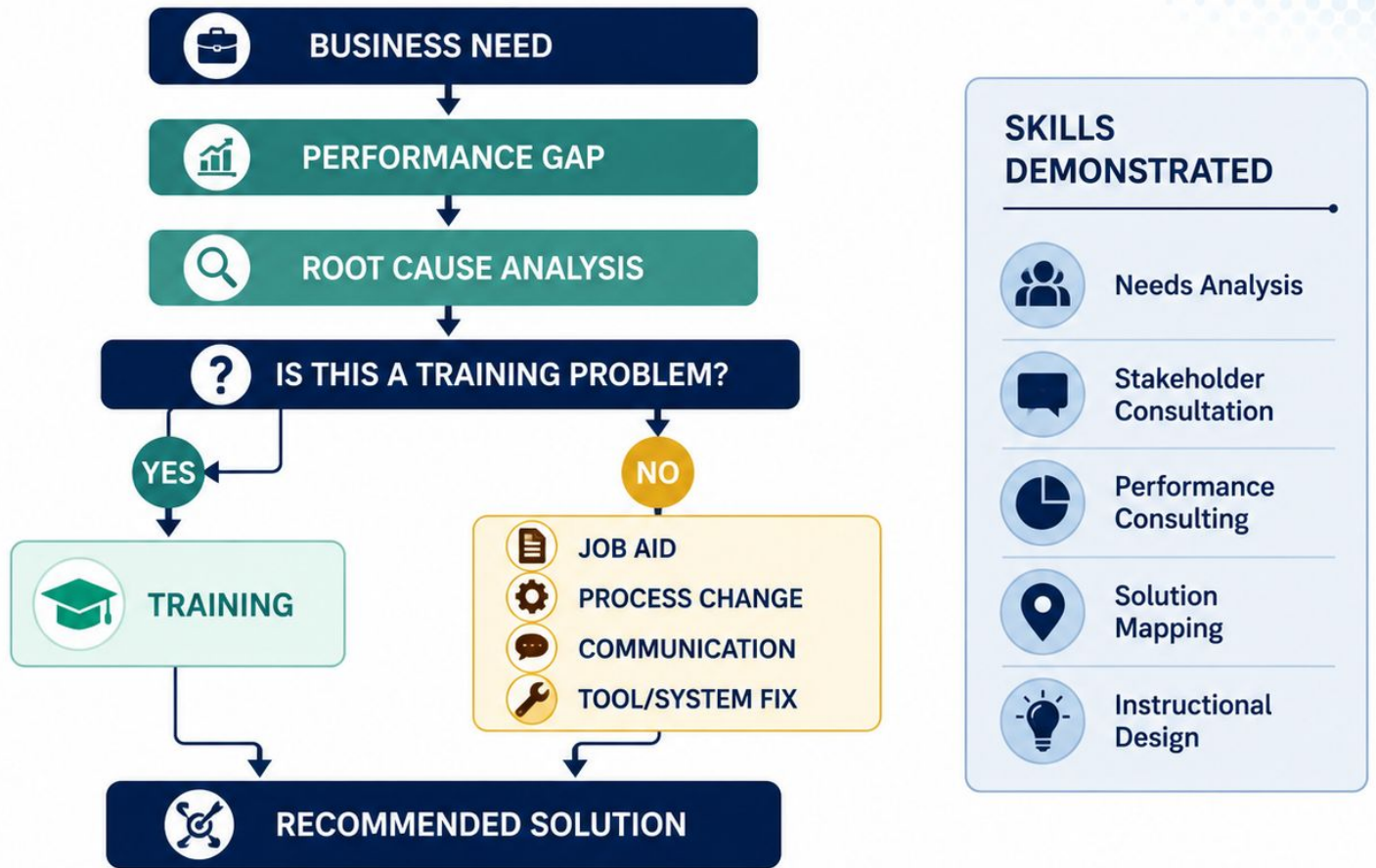




Learning Discovery & Performance Alignment Framework

A Structured Approach to Identifying Performance Gaps & Learning Solutions



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

An original instructional design and performance consulting framework informed by ADDIE, Kirkpatrick, the 5 Moments of Need®, Human Performance Improvement (HPI), and performance consulting best practices.

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)
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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)
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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 the learning solution to the learner's moment of need (5 Moments of Need® framework)**
 - **Knowledge** → explanation, examples, concept models (*New / More*)
 - **Skill** → practice, coaching, scenarios (*Apply*)
 - **Process** → job aid, checklist, decision tree (*Solve*)
 - **Change** → communication, reinforcement, manager support (*Change*)
 - **Attitude** → reflection, stories, social proof (*May occur across multiple moments.*)
 - ☐ 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)
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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
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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

This framework synthesizes concepts from several established instructional design and performance improvement models, including:

- ADDIE Model
- Kirkpatrick Four Levels of Evaluation
- 5 Moments of Need®
- Performance Consulting / Human Performance Improvement (HPI)
- Universal Design & WCAG accessibility principles

These models informed the structure of this framework while the workflow, decision process, and implementation checklist were developed as an original synthesis for learning discovery and performance alignment.