# Overview

Here are some general questions to get you started interviewing your client or SME. This isn’t an exhaustive or complete list. Questionnaire’s like this vary and can be designed more around the business need or learning need.

Tips for using:

* This is an internal document. Don’t send the document to your client. Instead, use it to guide your conversation and discovery
* Use the form with your client and SMEs. You don’t have to rely on only one person’s responses.
* Update the document as you use it. Rewrite the questions to fit your speaking style. Don’t consider this an exhaustive list.

# Project Overview and Background Information

* What is the training opportunity you’ve identified?
* What are the specific problems identified?
* What specific performance improvements or results do you expect as a result of the training?
* How will you evaluate the training?

# General Project Questions

* What’s the project about?
* Is there a desired seat time or run time?
* How and where will users access the course?
* Is this part of a blended program?

# Project Sponsors, Stakeholders and Subject Matter Experts

Here we identify the key players in the project. It’s good to understand who owns the project (sponsor) who is impacted by the project (stakeholder) and who’s the expert (SME) on the project.

* Who is the project sponsor?
* Who are the key stakeholders?
* Are there any others who will own the decision-making decisions? What are their roles and positions in your company?
* Who are the subject matter experts for the course?
* Who else should we consider?
* Are there any business units or departments who will want to participate?

|  |  |  |
| --- | --- | --- |
| **Role** | **Name** | **Title:**  **Phone:**  **Email:** |
| Executive sponsor |  | Title:  Phone:  Email: |
| Stakeholder |  | Title:  Phone:  Email: |
| Subject Mater Expert |  | Title:  Phone:  Email: |

# Desired Timeline

* When would you like to see the project begin?
* Does this training need to be completed by a specific date? Is that a hard or soft date? (Never hurts to ask)
* What is driving the timeline (legal/compliance, business opportunity, etc)
* Are there parts or topics that can be released earlier while the project is being completed? (job aids, interactive graphics, Engage)

# Existing Content & Resources

* What existing resources do employees currently have to learn this information?
* What source material currently exists? (.PDF, PowerPoint, handouts, documents, etc)
* What kinds of media, graphics are available? How will these be procured?

# Audience

* Who will be taking the course? (Internal vs. external, functional, departmental)
* What roles need to be trained?
* How many people need to be trained?
* What experience level are the learners?
* When will the new knowledge or training be used?
* What is the motivation for employees to take and complete this training?

# Additional Information

* What are the standards or guidelines to know about?
* What are your branding considerations?