

FREE RESOURCE

Project Health Check

A PRACTICAL GUIDE FOR TRAINING DEVELOPMENT PROJECTS

Training is an investment.
Make sure your initiative is ready.

iNStep Consulting
LEARNING and LEADERSHIP

BEFORE YOU BUILD

You may already have a training initiative in mind and a sense of the learning experiences and resources you want to build. Before assigning development resources, it helps to pressure-test the initiative and confirm that the foundation is in place.

The Project Health Check is a practical guide to help you think through the key factors that can affect the success, scope, and feasibility of a training development project before the build begins.

Who this resource is for

This guide is designed for HR, L&D, talent development, and other business leaders who are preparing to develop custom training and want to make sure the initiative is ready before committing significant time, budget, and internal resources.

It may be especially useful if you:

- ✓ Already have a training initiative in mind
- ✓ Are preparing to engage an internal development team or external learning partner
- ✓ Need to clarify project requirements before requesting estimates or proposals
- ✓ Want to identify gaps early, while changes are still relatively easy to make

WHY READINESS MATTERS

Training is a significant investment.

$846
per employee

Average direct learning expenditure in 2025

Source: ATD Research, 2026 State of the Industry Report

And the investment extends beyond development costs. A training initiative also draws on the time of subject-matter experts, reviewers, project leads, managers, and employees who will eventually participate in the learning.

When an initiative moves into development before key decisions have been worked through, changes that might have been simple early on can become more expensive and disruptive later.



A little pressure-testing up front can protect the investment.

GETTING STARTED

How to use this guide

Work through each section with a specific training initiative in mind. Use the questions as discussion prompts to pressure-test the initiative before significant development resources are assigned.

You may not know all of the answers right now. That is okay. Note the questions that need more discussion or discovery and use them to guide the next steps in planning the initiative.

The guide looks at five areas that can shape the success and feasibility of your training initiative:

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PERFORMANCE NEED

01

Do we understand the performance need?

Questions to consider

- [ ] What are people expected to do?
- [ ] What are they doing now?
- [ ] What is the observable difference between the two?
- [ ] Who is experiencing the performance gap?
- [ ] Is the gap consistent across the audience, or does it vary by role, experience, location, or another factor?
- [ ] What impact is the gap having on the business?
- [ ] What would improve if performance changed?

Understanding both the performance gap and its business impact helps you determine whether an intervention is warranted and what level of response makes sense.

A performance gap may look significant at first, but the business impact determines how much attention it warrants. Inconsistent performance that creates rework, delays, safety concerns, customer complaints, or compliance risk may justify a substantial investment.

In other cases, employees may use different methods but still produce acceptable results. If the variation has little effect on quality, efficiency, cost, or outcomes, a smaller intervention—or no formal training at all—may be appropriate.

Looking at who is affected matters too. A gap limited to one role, location, or experience level may call for a more targeted response than an issue affecting the entire audience.

Defining what should change, who is affected, and what the change is worth to the business helps establish the scope of the initiative before development begins.

WATCH FOR

A visible performance gap does not always mean a large intervention is warranted. Consider the business impact before deciding how much to invest.

CAUSE

02

Do we understand what is causing the gap?

Questions to consider

- [ ] Do people know what is expected of them?
- [ ] Do they have the knowledge they need?
- [ ] Have they had an opportunity to learn and practice a required skill?
- [ ] Have they ever demonstrated that they can perform a task correctly?
- [ ] Do they receive useful feedback on their performance?
- [ ] Do they have the tools, information, time, and resources needed to do the work?
- [ ] Are processes, systems, or policies making the desired behavior more difficult?
- [ ] Are there consequences, incentives, or workplace norms that encourage a different behavior?

Understanding the cause of the gap helps you determine what kind of support will change performance.

If employees have never demonstrated a skill correctly, the issue may be a skill gap. They may need instruction, demonstration, practice, and feedback.

If employees can perform a task correctly but do not do so consistently, the cause may be somewhere else. They may not have enough time, the process may be cumbersome, the system may make the desired behavior difficult, or the workplace may reward speed over accuracy.

A policy can also work against the behavior you want. For example, employees may be trained to follow a detailed review process, but if performance goals emphasize volume and turnaround time above all else, they may be encouraged to skip steps.

Sometimes the barrier is more basic: employees know what to do, but the information, tools, permissions, or resources they need are not available when they need them.

Answering these questions may confirm the initiative as planned or suggest changes in its size, format, audience, or supporting resources. This is the right time to make those adjustments, before significant development resources are assigned.

WATCH FOR

New information that changes the size, format, audience, or role of the training you originally planned.

LEARNERS

03

Do we understand the people this training is for?

Questions to consider

- [ ] Who needs the training?
- [ ] What do they already know or know how to do?
- [ ] Are there meaningful differences among learner groups?
- [ ] Where and when will they use what they learn?
- [ ] What tools, systems, or resources will they use on the job?
- [ ] How much time can they reasonably devote to training?
- [ ] What may make it difficult for them to participate in the training?
- [ ] What may make it difficult for them to apply what they learn afterward?
- [ ] Will they need reinforcement, reference materials, coaching, or other support after the formal training ends?

Understanding the learner context helps you design training that fits the way the work is performed.

A new employee and an experienced employee may need different levels of instruction, even when they are expected to perform the same work. A distributed workforce may need a different delivery approach than a team working in one location. Employees who spend most of their day away from a computer may need different access to learning than employees who work at a desk.

The work environment matters after training, too. If employees are expected to apply a new process but do not have access to the right tools, manager support, or reference materials when they return to work, the training may not be enough on its own.

These differences can affect the content, format, length, delivery method, and support resources included in the initiative.

WATCH FOR

Assuming one audience has one set of needs. Differences in experience, role, work environment, and access can change what the training needs to include.

PROJECT READINESS

04

Are the conditions in place to support development?

Questions to consider

- [ ] Is there a clear project sponsor or decision-maker?
- [ ] Are the right subject-matter experts available to support development?
- [ ] Is the source content available, accurate, and current?
- [ ] If content is still changing, do we know when it is expected to stabilize?
- [ ] Are the people responsible for reviews and approvals identified?
- [ ] Will reviewers have enough time to provide feedback when it is needed?
- [ ] Is there an established budget or budget range?
- [ ] Is the desired launch date realistic for the work involved?
- [ ] Are there technology, platform, or delivery requirements that need to be considered?
- [ ] Does this initiative need to connect with existing training, systems, processes, or other business changes?
- [ ] What risks or upcoming changes could affect the scope, timeline, resources, or implementation of the initiative?
- [ ] Have we identified how we would respond if those risks occur?

Project readiness includes identifying the conditions that could affect development before they become problems.

A project may have a clear audience and strong learning goals, but development can still stall if source content is incomplete, subject-matter experts are unavailable, or reviewers cannot make decisions within the project timeline.

Timing can also affect scope. A team may have several ideas for interactive activities, video, or custom development, but an aggressive launch date may require prioritizing the elements that are most important for the first release.

Risk planning helps the team look beyond the current project conditions. A pending system rollout, policy change, leadership transition, regulatory requirement, budget decision, or organizational restructuring could introduce new constraints or change what the training needs to address. Identifying those possibilities early allows the team to build appropriate time, resources, or contingency plans into the project.

The same is true of technology and implementation requirements. A solution that needs to work within an existing LMS, support multiple languages, or coordinate with a larger system rollout may require additional planning, resources, or lead time.

WATCH FOR

Dependencies, upcoming changes, or risks that could alter the scope, timeline, resources, or implementation plan.

SUCCESS

05

Do we know what success should look like?

Questions to consider

- [ ] What should people be able to do differently after the training?
- [ ] What should change in day-to-day performance?
- [ ] What business outcome should that change support?
- [ ] How will employees have opportunities to apply what they learn?
- [ ] Who will reinforce or support the new behavior after training?
- [ ] What evidence could show that the initiative is working?
- [ ] When would we expect to see that evidence?
- [ ] Are there existing measures, reports, or performance data we can use?

Defining success early helps connect the training to the results the organization expects to see.

A team may know that employees need to complete a new process more consistently, but "complete the process correctly" is only part of the picture. The organization may also expect fewer errors, faster turnaround times, better customer experiences, improved compliance, or less rework.

Those expectations influence the design. If success depends on employees applying a new behavior on the job, the initiative may need opportunities for practice, manager reinforcement, job aids, or follow-up support in addition to formal training.

It also helps to think about measurement before development begins. Existing reports, quality data, customer feedback, or performance metrics may already provide useful evidence. Knowing what information is available can help shape both the learning solution and the evaluation approach.

WATCH FOR

Success defined only as completion. Finishing the training may be one milestone, but the larger question is what should change afterward.

NEXT STEPS

You don’t need every answer before you begin.

The Project Health Check is designed to help you think through some of the factors that can shape the success, scope, and feasibility of a training development project. It is not intended to cover every question that may come up during planning and discovery.

You may finish this guide with several questions still unanswered. That is okay.

In many cases, those unanswered questions are exactly what a thoughtful discovery process is meant to uncover. The goal is to recognize them early enough that they can inform the project before significant development resources are committed.

Looking for a learning partner?

iNStep Consulting helps organizations turn business needs into practical learning solutions that support performance.

If you have a training initiative in mind and want help clarifying the requirements, shaping the solution, or carrying it through development, we’d be glad to partner with you.

Let’s talk about your training initiative.

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