



## Plan Phase Overview

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This overview lists the Plan phase inputs and outcomes necessary to develop training that is relevant, interactive, engaging, polished, and supported. Refer to the overall process checklist for additional context.

### Inputs

*What are the necessary inputs to complete this phase?*

- Training request form
- Audience data
- System/policy changes
- Historical data

### Description/Explanation

*What are the components of the Plan Phase?*

- The planning phase broadly encompasses two main elements, which proceed on parallel tracks:
  - Needs assessment (including the training needs assessment and training plan)
  - Project planning and management

The needs assessment answers the following basic questions about the program:

- Why, who, what, when, where, how?

Initially, a problem or need is identified, after which a solution is proposed (answering the question “why?”). Then, planning begins to create that solution. The “why,” therefore, serves as the entry criteria for the planning phase.

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|--------------|--|
| <b>Why</b>   | The training request form<br>(The business reason for conducting the course – sponsorship / sponsor’s goals) |
| <b>Who</b>   | Audience analysis  |
| <b>What</b>  | Learning objectives - skills<br>Content scope - knowledge  |
| <b>When</b>  | (Tied to why, based on the timeframe of the need/scope of the training effort)                               |
| <b>Where</b> | Logistics strategy   |
| <b>How</b>   | Delivery strategy  |

### Outcomes

*What are the outcomes of this phase?*

- A high-level training plan which will serve to create the instructional design plan in the Design phase
- A project plan, including project timeline forecasts, deadlines, etc.
- Necessary components for the Contracting Officer Representative (COR) to create a task order/statement of work, if applicable