



Plan Phase Overview

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.

Why	The training request form (The business reason for conducting the course – sponsorship / sponsor’s goals)
Who	Audience analysis
What	Learning objectives - skills Content scope - knowledge
When	(Tied to why, based on the timeframe of the need/scope of the training effort)
Where	Logistics strategy
How	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, budget, role map, etc.
- Necessary components for the Contracting Officer Representative (COR) to create a task order/statement of work, if applicable