

LEARNING, UPGRADED WORKED EXAMPLE

# Vague LMS Report Request to Decision-Ready Report Definition

Turn a vague monthly completion request into a report definition that names the decision, audience, metric, source field, cadence, owner, and caveat.

## Try this one thing today

Write the caveat before you build the report. If the caveat feels important, it belongs on the report.

## The messy version

### Vague report request

Can you send monthly completions for the new program? Leadership wants to know how it is going.

### What to notice

- The request asks for a metric before naming the decision.
- Completion might mean assigned, launched, started, completed, passed, overdue, or current depending on the LMS.
- The audience is leadership, but the action they can take is not named.
- The caveat needs to travel with the report so completion is not treated as behavior proof.

## Before

### Monthly completion report.

The report has a metric label, but no decision, audience action, source field, inclusion rule, owner, cadence, or caveat.

## After

### Readiness follow-up report for regional leaders.

Decision: where to focus coaching. Audience: regional leaders. Metric: completion plus readiness check and manager observation. Cadence: monthly for 90 days. Caveat: completion shows exposure, not behavior change.

## Why this is better

- The report has a decision and an audience action.

- The metric definition can be checked against the LMS source field.
- The cadence matches the follow-up window.
- The caveat reduces overclaiming before the report circulates.

## Three ways to build it

### Manual way

Use one report-definition card before opening the LMS. If the decision, metric definition, source field, and caveat are blank, the report is not ready.

### Microsoft 365 or Google Workspace way

Create a definition library in Microsoft Lists, SharePoint, Excel, or Google Sheets. Link each report to its definition and review date.

### AI-assisted way

Ask AI to turn the request into a report definition draft, identify ambiguous metric language, and create questions for the LMS owner. Do not let AI invent source fields.

#### AI output validation

These prompt starters were created for the May 2026 model landscape. Verify all AI outputs before using them with learners, reviewers, leaders, customers, partner teams, or compliance-sensitive work. Do not paste sensitive or proprietary material into an AI tool unless your organization has approved that tool for that data.

## Report Definition Card

Recreate these fields in a document, spreadsheet, List, Sheet, or working note.

- Report name: New program readiness follow-up
- Decision supported: Where regional leaders focus coaching
- Audience: Regional leaders
- Action threshold: Any region below 85 percent completion or below usually on manager observation
- Metric definition: Completed assigned module and passed readiness scenario
- Includes: Assigned learners in active regions
- Excludes: Exempt learners, archived assignments, test users
- Source field: LMS completion status; readiness scenario score; manager observation scorecard
- Cadence: Monthly for 90 days
- Owner: Learning operations lead

- Caveat: Completion shows exposure and readiness check result. It does not prove behavior change by itself.
- Review date: 2026-06-30

## Copy-ready artifact

```
# Report Definition Card | Field | Definition | | --- | --- | | Report name | | | Decision supported | | |
Audience | | | Action threshold | | | Metric definition | | | Includes | | | Excludes | | | Source field or export
| | | Cadence | | | Owner | | | Caveat | | | Review date | | Rule: A report is not decision-ready until the
definition and caveat are visible.
```

## Prompt starters

### ChatGPT GPT-5 family

Use an outcome-first prompt with the job, approved source material, constraints, and the exact artifact you want back.

I am working on Turn an LMS report request into a decision-ready definition for an L&D system problem. Goal: Help me turn the notes below into a practical next move. Context: Use this when a report request starts with a metric and needs the decision, audience, source field, cadence, owner, and caveat defined. Use these working fields: report name, decision supported, audience, action threshold, metric definition, source field, cadence, owner, caveat. Rules: - Use only the source notes I provide. - Do not invent policy details, metrics, learner needs, compliance requirements, or business context. - Separate known facts, assumptions, missing information, and next actions. - Flag anything that needs requester, reviewer, leader, legal, compliance, LMS owner, or manager confirmation. - Keep the output practical enough to review in a working meeting. Source notes: [paste approved notes here] Return: 1. Report definition card 2. Known facts 3. Assumptions 4. Missing information 5. Ambiguous metric language 6. Questions for the LMS owner 7. Recommended next action

### Claude 4 family

Use XML-style sections so context, source material, task, constraints, and output format stay separate.

```
<context> I am working on Turn an LMS report request into a decision-ready definition for an L&D system problem. Use
this when a report request starts with a metric and needs the decision, audience, source field, cadence, owner, and
caveat defined. </context> <source_notes> [paste approved notes here] </source_notes> <task> Turn the source notes
into a practical next move using these working fields: report name, decision supported, audience, action threshold,
metric definition, source field, cadence, owner, caveat. </task> <constraints> Use only the source notes provided. Do
not invent policy details, metrics, learner needs, compliance requirements, or business context. Separate known facts,
assumptions, missing information, risks, and next actions. Flag anything that changes scope, ownership, evidence,
risk, or decision rights. </constraints> <output_format> 1. Report definition card 2. Known facts 3. Assumptions 4.
Missing information 5. Ambiguous metric language 6. Questions for the LMS owner 7. Recommended next action
</output_format>
```

### Gemini 3 family

Use a clear task, labeled input, and one example pattern. For Obsidian context, use approved excerpts, Drive exports, Google Docs, or NotebookLM source sets.

Task: Help me make progress on Turn an LMS report request into a decision-ready definition from the notes provided.

Context: Use this when a report request starts with a metric and needs the decision, audience, source field, cadence, owner, and caveat defined. Working fields: - report name - decision supported - audience - action threshold - metric definition - source field - cadence - owner - caveat Example pattern: Field: Missing information Good answer: Name the specific information to confirm, who can confirm it, and why it affects the next decision. Rules: - Use only the source notes provided. - If information is missing, write "Needs confirmation". - Keep the output concise and reviewable. - End with the next best action. Source notes: [paste approved notes here] Output format: 1. Report definition card 2. Known facts 3. Assumptions 4. Missing information 5. Ambiguous metric language 6. Questions for the LMS owner 7. Recommended next action

## Microsoft 365 Copilot

Use goal, context, source, expectations, and output. For Obsidian context, use approved excerpts, Word summaries, OneDrive files, SharePoint pages, Teams context, or Outlook threads.

Goal: Help me make progress on Turn an LMS report request into a decision-ready definition. Context: Use this when a report request starts with a metric and needs the decision, audience, source field, cadence, owner, and caveat defined. Source: Use the selected document, meeting notes, spreadsheet, email thread, SharePoint file, or pasted notes as the only source. Expectations: - Work with these fields: report name, decision supported, audience, action threshold, metric definition, source field, cadence, owner, caveat. - Mark uncertain items as "Needs confirmation". - Do not add facts that are not in the source. - Separate known facts, assumptions, missing information, risks, and next actions. - Summarize the top review questions for the team. Output: 1. Report definition card 2. Known facts 3. Assumptions 4. Missing information 5. Ambiguous metric language 6. Questions for the LMS owner 7. Recommended next action

## What changed in the system

The team stops producing numbers on request and starts treating reports as governed decision tools.

## Field test

Before building the next LMS report, ask the requester to finish this sentence: if this number changes, we will decide whether to...