

LEARNING, UPGRADED FIELD TOOL

Training Request Triage Questions

A one-page question set for slowing down vague training requests before the team accepts the requested format.

Try this one thing today

Use the six triage questions on one live request before you accept the requested format.

Use this when

- A requester asks for a course before naming the task.
- The team suspects the answer might be a job aid, workflow change, manager support, or tool fix.
- The request feels urgent, but the performance problem is still fuzzy.

Systems thinking move

Treat the requested training as an input, not the answer. The request is a clue about a larger system made of people, policies, tools, handoffs, incentives, information, and evidence.

Quick use

Ask one question from each row before accepting the format. If the requester cannot answer, the next move is discovery, not production.

Working rows**Outcome**

What to do: What should someone be able to do that they cannot reliably do now?

What it tells you about the system: The request is tied to behavior, not a title.

Audience

What to do: Which role, moment, or workflow does this affect?

What it tells you about the system: The support can be designed for the people doing the work.

Break point

What to do: Where does the work fail today?

What it tells you about the system: The team can see whether the problem is skill, memory, workflow, tool, manager support, or data.

Current workaround

What to do: What do people do now when they get stuck?

What it tells you about the system: Workarounds reveal where the system is already teaching people the wrong thing.

Evidence

What to do: What would make us comfortable saying the support helped?

What it tells you about the system: The request has a success signal before launch.

Smallest useful move

What to do: What is the smallest support that could help before we build a course?

What it tells you about the system: The team can test performance support before defaulting to training.

Three ways to act

Manual way

Use the questions in a 15-minute requester conversation. Write the answers in plain language and end with a decision: build, redirect, inspect, pause, or gather examples.

Microsoft 365 or Google Workspace way

Use Microsoft Forms, Google Forms, Word, Docs, Excel, Sheets, SharePoint Lists, or Microsoft Lists after the questions work in conversation. Do not turn bad questions into a formal form.

AI-assisted way

Use AI to turn rough request notes into likely problem patterns, missing information, non-training causes, and follow-up questions. Keep the human decision owner visible.

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.

Unconventional moves

- Ask for the anti-request: what should we not build for this problem?
- Create a friction receipt. Send the requester a short note naming what is known, what is missing, and what decision cannot be made yet.
- Prototype the smallest non-course support first. A checklist, decision tree, manager prompt, or searchable article may teach more than a course request.
- Ask where the behavior already happens correctly. The best source material may be the team or region that already solved the problem.

Copy-ready structure

Use the HTML page for the copy button. This PDF includes the working fields so you can recreate the structure in Word, Docs, Excel, Sheets, Lists, or a shared planning note.

- Outcome: What should someone be able to do that they cannot reliably do now?
- Audience: Which role, moment, or workflow does this affect?
- Break point: Where does the work fail today?
- Current workaround: What do people do now when they get stuck?
- Evidence: What would make us comfortable saying the support helped?
- Smallest useful move: What is the smallest support that could help before we build a course?