

LEARNING, UPGRADED TEMPLATE

# Measurement Planning Worksheet

Define the decision your evidence needs to support before the team defaults to completions, satisfaction, or dashboard noise.

## Try this one thing today

Write the decision first: what will we do differently if the evidence says this is working or not working?

## Use this when

- A leader asks whether training worked, but the team only has completions.
- The team needs evidence tied to readiness, behavior, adoption, manager feedback, or workflow impact.
- A program needs a realistic measurement plan before launch.

## What to have ready

- The program goal or business question leaders are asking.
- The behavior, task, or workflow the learning is supposed to improve.
- Any data the team can realistically collect before and after launch.

## Start this in 15 minutes

1. Write the decision the evidence needs to support before choosing data.
2. Choose one behavior signal and one readiness signal.
3. Name what the evidence can prove and what it cannot prove.
4. Decide when the team will review the evidence after launch.

## Blank working version

Fill only what you know. Mark missing information as Needs confirmation instead of guessing.

### Decision

What decision does the evidence need to support?

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**Behavior**

What behavior should change in the work?

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**Readiness**

What practice, scenario, or check shows readiness before live work?

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**Adoption**

What signal shows people are using the workflow or support?

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**Workflow impact**

What operational signal might move if this improves?

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**Evidence limit**

What can this evidence not prove?

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**Filled example**

**Decision**

Decide whether new hires are ready to handle quote exceptions without manager intervention.

**Behavior**

New hires identify the exception path and choose the right approval route.

**Readiness**

Scenario scorecard for three quote exceptions during onboarding.

**Adoption**

Usage of the job aid during first-week quote tasks.

**Workflow impact**

Fewer approval reroutes and fewer manager corrections on first submitted quotes.

**Evidence limit**

This cannot prove revenue impact by itself. It can show readiness and cleaner first-pass work.

## Conversation script

- We can report completions, but that will not answer the whole question.
- Before we build the measurement plan, what decision are we trying to make with the evidence?
- Once we know that, we can choose the smallest credible signal instead of building a dashboard nobody trusts.

## How to decide

### Low-stakes reference content

Use completion, access, and a lightweight confidence check.

### Skill practice or onboarding readiness

Use scenario practice, role play, scorecards, or manager observation.

### High-stakes operational work

Use behavior signals, workflow data, manager feedback, and follow-up evidence.

### Leader asks for ROI too early

Start with value evidence: readiness, behavior, adoption, and workflow impact.

### Data is hard to collect

Choose a smaller credible proxy and name the evidence limit.

## Microsoft 365 or Google Workspace

Use Forms, Excel, Sheets, Power BI, Looker Studio, or a shared scorecard to collect one behavior signal and one manager observation.

## AI-assisted help

Use AI to draft evidence options, manager observation questions, role-play scoring criteria, and a short results summary from approved source data.

### 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.

## Validation checklist

- The evidence connects to a decision, not just a dashboard.
- The plan includes at least one signal beyond completion.
- The evidence limit is stated clearly.
- The collection method is realistic for the team to maintain.
- Check every fact against an approved source.
- Mark anything AI guessed, inferred, or could not confirm.
- Remove private, sensitive, or customer-specific details that should not be in the working file.
- Confirm the right human owner approves the final decision.
- Review tone, accessibility, and learner impact before anything goes live.