

LEARNING, UPGRADED TEMPLATE

# Training Intake Worksheet

Use this before accepting a course, workshop, job aid, or content request so the team can name the task, audience, workflow, and evidence standard.

## Try this one thing today

Before accepting the next request, ask: what should someone be able to do that they cannot reliably do now?

## Use this when

- A requester asks for a course before naming the performance problem.
- The team needs to decide whether the answer is training, documentation, workflow support, manager support, or a platform fix.
- You need a lighter intake conversation that still creates a useful decision.

## What to have ready

- The original request, ticket, email, or meeting note.
- The role or audience the request is supposed to help.
- Any example of where the work breaks today.

## Start this in 15 minutes

1. Paste the blank version into the tool where the request already lives.
2. Fill only Request, Audience, and Task first. If those are unclear, pause the build conversation.
3. Ask the requester one behavior question before choosing the format.
4. Close with one decision: build, redirect, document, inspect, or gather more evidence.

## Blank working version

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

### Request

What is being requested, and what asset has already been named?

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**Audience**

Who needs help, and what role or workflow are they in?

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**Task**

What should someone be able to do after the support exists?

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**Where it breaks**

Where does the work fail today?

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**Evidence**

What would show the support helped?

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**Decision**

What should we build, redirect, document, or inspect next?

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**Filled example**

**Request**

Requester asks for a 60-minute workshop on using the new quote workflow.

**Audience**

New customer-facing team members who create quotes during onboarding.

**Task**

Create a clean first quote without missing required fields or routing it to the wrong approver.

**Where it breaks**

People miss the approval rule when discount level and customer segment both change.

**Evidence**

Fewer quote corrections, fewer approval reroutes, and faster first-pass approval for new hires.

**Decision**

Build a short task aid and scenario practice before deciding whether a workshop is needed.

## Conversation script

- I can help with this, but I need to understand the work before we choose the asset.
- What should someone be able to do that they cannot reliably do right now?
- If we can name the audience, task, where the work breaks, and evidence, we can decide whether this is training, documentation, workflow support, manager support, or a tool issue.

## How to decide

### The task is clear and practice is needed

Build training or scenario practice.

### The task is clear but people need a reminder at the point of work

Build a job aid or knowledge-base article.

### People know what to do but the process keeps breaking

Inspect the workflow before building another asset.

### The blocker is manager coaching or local reinforcement

Add manager support instead of another course.

### The tool, permissions, or data are the blocker

Route the issue to the platform or operations owner.

## Microsoft 365 or Google Workspace

Turn the fields into Microsoft Forms, Google Forms, SharePoint Lists, or a simple spreadsheet only after the triage questions are working in conversation.

## AI-assisted help

Use AI to turn a rough request into clarifying questions, likely non-training causes, and a first-pass scope summary for human review.

### 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 requested asset is not treated as the answer until the task is named.
- The audience is specific enough to design for real work.
- The evidence would help someone decide whether the support worked.
- The final decision names what happens next and who owns it.
- 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.