



Performance-based Training Blueprint

This framework standardizes how training is defined before development begins. It brings structure to stakeholder conversations, ensuring performance expectations, workflows, and risks are clearly documented and aligned.

By establishing this foundation early, it improves consistency across course design, reduces ambiguity, and supports the development of training that is accurate, actionable, and ready for implementation.

Important note: The development tables in Parts 1 and 2 are also available as standalone, downloadable working templates for facilitated sessions, independent use, and rapid design alignment. These templates feature built-in tools for alignment and sign-off to formally document stakeholder agreement. The Training Story template includes a performance alignment sign-off table, while the Training Plan template contains an alignment checklist.

Part 1: Define the Training Story

This step must be completed before any training design begins. It is a framework designed to prevent misaligned, unusable, and low-transfer training by anchoring design decisions in real job performance before any content is built.

Adult learners expect training to be clear, relevant, and immediately applicable to their work. To meet that expectation, instructional design must begin with a shared understanding of the real-world performance story behind the task.

This step aligns designers, subject matter experts, and stakeholders around real-world expectations — who the training is for, what must be done on the job, and what is at stake when performance succeeds or fails. This shared story becomes the foundation of the Training Plan and prevents misaligned objectives, unusable content, and training that does not transfer to real work.

Reminder: All contributors, including portfolio managers, L&D directors, IDs, and project SMEs/stakeholders, are responsible for final sign-off before developing the training plan.

Key elements and why it matters	Details to discuss	Notes
Who is the learner? <i>Capture a clear picture of the person this training is built for—so design decisions reflect real conditions.</i> If this section cannot be answered clearly, training should not proceed.	Primary role and job responsibilities	
	Experience level, prior knowledge, and confidence with the task	
	Environmental or time constraints that affect performance	
	Common errors, hesitations, or points of confusion	
What must the learner do on the job? <i>Focus on what learners must do, not just what they must know.</i> If this section cannot be answered clearly, training should not proceed.	Critical tasks, workflows, and decision points	
	Key rules, guidelines, and standards	
	Common mistakes and high-risk steps	
	Moments where judgment matters	
Why does it matter? <i>Identify what changes for someone when this is done right or wrong?</i> If this section cannot be answered clearly, training should not proceed.	What can go wrong if steps are missed	
	What improves when tasks are done well	
	Human, operational, legal, safety, or customer impacts	
	Consequences that affect people, safety, customers, operations, or compliance	
Where and when will this be used? <i>Let the learners picture themselves in the moment.</i> If this section cannot be answered clearly, training should not proceed.	Physical and digital environments	
	Typical timing (busy periods, deadlines, emergencies, etc.)	
	Real scenarios where this task occurs	
	Tools, systems, and materials involved	
How will we know the learner can do this? <i>Anchor the learning through action; what would “doing it right” look like without supervision?</i> If this section cannot be answered clearly, training should not proceed.	Scenario-based decision points	
	Simulations and guided practice	
	Hands-on or job-based tasks	
	Capstone activities and targeted knowledge checks	

Next, Part 2 will convert this story into your actual training architecture—objectives, formats, content types, and delivery strategies.

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Part 2: Build the Training Plan

To ensure consistency, alignment, and scalability across course development, the Training Plan serves as the governing blueprint for all training initiatives. It is a document that can help create multi-lesson and single-lesson courses, video presentations, and even workshops.

A training plan standardizes structure, wording, and instructional flow across designers and projects, so every lesson (or topic) functions as part of a unified course system.

The Training Plan comprises three key parts that set the standards for every lesson in the course: Course information, Course objectives, and Lesson outlines.

Build the Training Plan as follows:

- 1. Update the Course information section**
Define the course type, duration, target audience, prerequisite knowledge, and required resources that support development and delivery.
- 2. Establish lesson structure in the Course objectives table**
Outline the logical sequence of the lessons and document the terminal learning objective for each lesson.
- 3. Insert the Lesson outline template for each lesson in the course**
Access the template via Insert > Quick Parts > Lesson outline.

- 4. Complete the following:**
 - Update the lesson name and terminal learning objective from the Course objectives table
 - Indicate lesson duration in minutes
 - Define objectives with precision—the lesson terminal learning objective must align directly with the corresponding course objective, while enabling learning objectives break the terminal objective into smaller, measurable skills that drive assessment and content decisions
 - Build lesson topics based on the enabling objectives
 - Identify engaging activities, including demos, guided practice, scenario-based tasks, and reinforcement activities designed to support the learner experience
 - Add design constraints and implementation notes — document design features, system limitations, and delivery considerations that affect implementation

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[Course/Video/Workshop Name] Training Plan

[GUIDANCE: This Training Plan can be used for multi-lesson and single-lesson courses, video presentations, or workshops. Adjust the table headings as needed, then delete this guidance.]

Course name	
Course code	
Assigned to	

Course information

Delivery method	Select a method
New or update	Update or New
Duration in hours/minutes	
Course description	
Target audience	
Prerequisites courses (if applicable) and/or knowledge	
Resources, for example: Supporting documents <ul style="list-style-type: none">• Videos• Reference materials (e.g., vocabulary)• Supporting websites	
Additional notes	

[GUIDANCE: Delete or add rows based on the number of lessons proposed in the course, then delete this guidance.]

Course objectives

Lesson #	Name	Terminal learning objective
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		

[GUIDANCE: If the needs/tasks analysis indicates supplemental information is needed, please add appropriate appendix information, then delete this guidance.]

Appendices	Name	General details
A		
B		
C		
D		

[GUIDANCE: Insert a lesson outline for each lesson from the Quick Parts building blocks, found in the Text group under the Insert tab. After completing a table for each lesson in the course, delete this guidance.]

Lesson #: Name in sentence case

Lesson overview/purpose	
Lesson terminal objective Refer to the Course objectives.	
Duration	
Lesson enabling objectives List the specific, measurable learning outcomes that support the course objective.	
Key topics List the concepts/tasks that support the enabling objectives. Note: Multiple objectives may be combined into a single topic for better instructional flow.	
Activities List instructional methods in the lesson, e.g., Demos, videos, hands-on exercises. Note: Ensure these activities are tied directly to the enabling objectives.	
Resources Identify the materials needed for this lesson, e.g., Workbooks, reference guides, job aids, and videos.	
Important notes	

Alignment and verification

Review the details of each lesson and verify this information before development starts.

Alignment check	Verification	Reference point/comment
Terminal objective	Does the lesson's terminal objective directly relate to the lesson goal?	
Activities	Are the activities (demos, scenarios) built around what the learner does on the job tasks, workflows, and decision points?	
Resources	Have all the tools, systems, and materials been identified as required resources for the lessons to ensure the learner will know where and when to handle situations?	
Enabling objectives	Do the enabling objectives break down tasks into small, measurable skills that drive the final assessment?	
Format, delivery	Does the chosen delivery method (eLN, ILT, etc.) allow the learner to practice in conditions that reflect their real environment?	