

Needs Analysis & Intake

A course for running a real needs analysis, from first conversation to signed-off scope

Who it's for

Instructional designers and learning professionals doing the work, and the HR professionals and senior leaders who sponsor or bring in this training for their teams.

Why this matters

Every instructional designer has learned needs analysis in theory. But knowing the model isn't the same as running one on a real project, with a real stakeholder, on a real deadline. Skip the guardrails and you're chasing a moving target instead of a clear one. That gap costs you:

- **Time** — chasing clarification and rework because the ask was never fully understood upfront.
- **Cost** — budget conversations that happen too late, after work has already started.
- **Quality** — final deliverables that miss the mark because expectations were never pinned down.

This is project-based learning: you'll work through real or mock cases as a group, building toward a shared framework, with checklists provided for every stage, so you leave with hands-on experience, not just theory.

Performance objectives

By attending this session, you'll be able to:

- Ask the questions that surface what's actually needed, not just what's asked for
- Put guardrails around a project's scope so expectations are managed from day one
- Work through a real or mock case as a group, learning to articulate and manage a program hands-on
- Walk away with a reusable framework and checklists for every stage of intake

Duration: Flexible to fit your team. Choose from a single 3-hour session, two 3-hour sessions across two days, or a full 6-hour, one-day format. Includes 1 to 2 hours of homework between sessions.

The intake process, step by step

- **Ask** — the core questions that surface what's actually needed
- **Document** — capture the need in a way both sides can point back to
- **Scope** — put guardrails around what's in, and what's out
- **Cost** — bring budget into the conversation early, not as a surprise later
- **Present** — walk the stakeholder through it, so everyone signs off aligned

How it's delivered: live, virtual, project-based. Working through a real or mock case as a group, you build toward a shared framework together, with checklists provided for every stage, so you leave with hands-on experience articulating and managing a real project.

[Email us to get started](#)

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