



Design Document Starter Template

Updated August 6, 2026

Print this template or fill it in digitally. Work through the sections in order. By the end you will have a design document you can walk a stakeholder through and get approved before you build a single slide.

A design document is the bridge between "we need training" and a solution that changes performance on the job. This is the starter version of the design document my paid program members use on client projects. It is shorter on purpose, and it covers everything a small project needs.

1. Project snapshot

Field	Your answer
Project title	
Client or team	
Prepared by	
Date	
Decision maker (who signs off)	

2. Executive summary

Summarize the performance problem, its root cause, and your proposed solution in one or two short paragraphs. Write this section last. It is the 30 second version of the whole document, and it is the only part some stakeholders will read.

Your executive summary

3. Project overview

Answer each prompt in a few sentences. If you cannot answer one yet, that is a conversation you need to have with a stakeholder before you keep designing.

Business problem

What is going wrong on the job, and what are the symptoms? Name the performance gap, not the training request.

Your business problem

Tip

If the request came in as "we need a course on X," ask what people are doing or failing to do today. The gap between current and desired behavior is your real problem statement.

Business goal

What measurable business result are you aiming for? Tie it to a number someone already tracks.

Your business goal

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Tip

A good goal names a metric and a direction. "Reduce onboarding support tickets by 20% in Q3" works. "Improve product knowledge" does not.

Target audience

Who will complete this training? Note their role, experience level, work environment, and anything that shapes how they will learn best.

Your target audience

Proposed solution

Describe the learning solution at a high level: the format or formats, the delivery method, and the core strategy. For example, a self-paced module with scenario practice plus a job aid for on-the-job reinforcement.

Your proposed solution

4. Objectives and assessment

Everything in your design should trace back to a performance objective, something learners will do on the job, not just know. Fill in one block per objective. Most projects need two to four. Two blocks are below, so print this section again if you plan more.

Objective 1

Performance objective. What will learners be able to do on the job after training? Include a measurable verb, the conditions, and the criteria for success. For example: "Given an upset caller, de-escalate the call following the LEAP framework in under 4 minutes."

Your performance objective

Enabling objectives. Break the performance objective into the three to six building-block skills or knowledge learners need first. Use clear, actionable verbs and order them from recognition and recall up to decision-making and action.

#	Enabling objective (starts with a verb)
1	
2	
3	
4	
5	
6	

Assessment plan. How will you know learners met the objective? Describe what they will demonstrate and the passing bar, before they are expected to perform on the job.

Your assessment plan

Delivery method. Which modality fits this objective: self-paced eLearning, virtual or in-person instructor-led, blended, or resources in the flow of work?

Your delivery method

Objective 2

Performance objective. What will learners be able to do on the job after training? Include a measurable verb, the conditions, and the criteria for success.

Your performance objective

Enabling objectives. Break the performance objective into the three to six building-block skills or knowledge learners need first.

#	Enabling objective (starts with a verb)
1	
2	
3	
4	
5	
6	

Assessment plan. How will you know learners met the objective? Describe what they will demonstrate and the passing bar.

Your assessment plan

Delivery method. Which modality fits this objective?

Your delivery method

5. Evaluation plan

Decide how you will measure success before you build anything. Kirkpatrick's four levels are the standard checklist. Fill in how you will answer each question, and give each level enough space to name a method and a timeframe.

Level	Question it answers	How you will measure it
1. Reaction	Did learners find the experience relevant and worth their time?	_____
2. Learning	Can learners demonstrate the objectives by the end of training?	_____
3. Behavior	Are learners applying the new skills on the job weeks later?	_____
4. Results	Did the business goal from your project overview actually improve?	_____

Tip

Levels 3 and 4 are where stakeholders live. Agree now on who will pull the business number, and when. If nobody owns that step, it will not happen.

6. Sign-off and next steps

Walk your decision maker through this document and get written approval before development starts. Fixing a design document costs minutes. Fixing a built course costs days.

Name	Role	Approval date

Once it is signed:

- ☐ Turn each objective into a storyboard or session outline.
- ☐ Develop the solution and pilot it with a small learner group.
- ☐ Revise based on the pilot, then launch.
- ☐ Run your evaluation plan on schedule, including the Level 3 check weeks after launch.
- ☐ Report the results against the business goal in section 3.

Keep this document with the finished project. When someone asks six months from now why the course exists or what it was supposed to change, this is the answer.

Have any questions? Email me at devlin@devlinpeck.com