

The Instructional Design Project Checklist

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This checklist walks you through the five phases of an instructional design project. Work each phase in order. Do not start the next phase until the current one is done. The last page is a condensed master checklist you can print and keep at your desk.

Phase 1: Kickoff

Get the answers below before you commit to a solution. Most project problems trace back to a kickoff question that never got asked.

- ☐ Identify the project sponsor and confirm they have budget and sign-off authority
- ☐ Ask what business problem prompted this request
- ☐ Ask how the sponsor will know the project worked, in numbers if possible
- ☐ Ask what happens if nothing is built at all
- ☐ Identify the audience: roles, headcount, locations, and languages
- ☐ Ask what has already been tried and why it fell short
- ☐ Confirm the deadline and what is driving it
- ☐ Identify the subject matter experts and confirm their availability in writing
- ☐ Agree on a review cadence and who gives final approval at each milestone
- ☐ Confirm the delivery environment: LMS, devices, and any tech constraints
- ☐ Document all of the above in a project brief and get the sponsor's written approval

Questions to ask before agreeing to build a course

Is this a skill gap, a knowledge gap, a motivation problem, or an environment problem? Can the audience already do the task when conditions are right? If people know how to do the job but do not do it, a course will not fix it. Say so now, and propose the fix that matches the actual problem.

Phase 2: Analysis

Verify the problem before you design anything. The goal of this phase is a clear picture of the gap between current performance and desired performance.

- ☐ Interview or survey people who do the job today
- ☐ Interview top performers and note what they do differently
- ☐ Observe the task in the real work environment if you can
- ☐ Define the performance gap: what people do now versus what they need to do

- ☐ Confirm the root cause supports a training solution
- ☐ Write measurable learning objectives tied to on-the-job behavior
- ☐ Audit existing content, policies, and job aids you can reuse
- ☐ Document constraints: time, budget, tools, and compliance requirements
- ☐ Share your analysis summary with the sponsor and confirm alignment before design

Tip

Your best analysis data comes from the people closest to the work, not from the people who requested the training. If your only input so far is the sponsor's opinion, you have not done analysis yet.

Phase 3: Design & Storyboard

Turn the analysis into a blueprint. Every design decision should trace back to an objective from Phase 2.

- ☐ Choose the delivery format based on the objectives, not on habit
- ☐ Outline the structure: modules, topics, and estimated seat time
- ☐ Map every section to a specific learning objective and cut anything that does not map
- ☐ Draft realistic practice activities that mirror the actual task
- ☐ Write the storyboard with full on-screen text, narration, and interaction notes
- ☐ Review each screen against these criteria: it serves an objective, the language is plain, the interaction has a purpose beyond clicking
- ☐ Confirm assessments measure the objectives, not trivia recall
- ☐ Send the storyboard to SMEs for accuracy review
- ☐ Send the storyboard to the sponsor for approval
- ☐ Get written sign-off before development begins

Storyboard review rule

Do not open your authoring tool until the storyboard has written sign-off. A change costs minutes in a storyboard and hours in a built course. Reviewers who skim the storyboard will find every problem after development instead, so push for a real review now.

Phase 4: Development

Build the approved storyboard, then test it like a skeptic. QA is part of development, not an afterthought.

- ☐ Build to the approved storyboard and log any deviations
- ☐ Test every button, branch, and interaction, including the wrong-answer paths
- ☐ Check navigation: learners can move forward, back, and resume where they left off
- ☐ Proofread all on-screen text against the storyboard
- ☐ Check audio: consistent volume, no clipping, narration matches the script
- ☐ Add closed captions and alt text, and test keyboard-only navigation

- ☐ Publish and test in the actual LMS, including completion and score reporting
- ☐ Test on the devices and browsers your audience actually uses
- ☐ Run a full pass as a learner, start to finish, without touching author view
- ☐ Fix defects, retest the fixes, and get final stakeholder approval to launch

QA tip

Preview mode lies. A course that runs clean in your authoring tool can still fail to report completion in the LMS. Always test the published package in the real delivery environment before you call it done.

Phase 5: Evaluation

Close the loop on the success measure you defined at kickoff. This phase is what separates a finished project from a proven one.

- ☐ Pilot with a small group from the real audience before full launch
- ☐ Collect learner feedback on clarity, relevance, and difficulty
- ☐ Review assessment data and flag questions most learners miss
- ☐ Fix issues the pilot surfaced, then launch to the full audience
- ☐ Follow up 30 to 60 days after launch: are people doing the task differently?
- ☐ Compare results against the success measure from your kickoff brief
- ☐ Report results to the sponsor, including what worked and what did not
- ☐ Document lessons learned while they are fresh
- ☐ Schedule a content review date so the course does not quietly go stale

Evaluation question

"Did they like it?" is the weakest question you can ask. The question that matters is the one from kickoff: did the number the sponsor cares about move? If you cannot answer it, plan the follow-up that will.

Common project types and typical deliverables

Use this table to set expectations early. Naming the deliverables at kickoff prevents scope surprises later.

Project type	Typical deliverables
Self-paced eLearning course	Project brief, storyboard, published SCORM or xAPI package, LMS test report
Instructor-led or virtual training	Facilitator guide, participant guide, slide deck, practice activities
Job aid or performance support	Task analysis, one-page reference, checklist or flowchart, distribution plan

Training video	Script, storyboard or shot list, edited video with captions, hosting plan
Scenario-based simulation	Scenario map, character and branching design, evaluation rubric, published sim
Blended learning program	Curriculum map, per-component deliverables above, learner journey outline

The one-page master checklist

Print this page and keep it with your project. One line per critical checkpoint.

Kickoff

- ☐ Sponsor, business problem, and success measure documented
- ☐ Audience, deadline, and constraints confirmed
- ☐ SME availability and review cadence agreed in writing
- ☐ Project brief approved

Analysis

- ☐ Performers interviewed or observed
- ☐ Performance gap and root cause defined
- ☐ Measurable objectives written
- ☐ Analysis summary confirmed with sponsor

Design & Storyboard

- ☐ Every section mapped to an objective
- ☐ Practice mirrors the real task
- ☐ SME accuracy review complete
- ☐ Written storyboard sign-off received

Development

- ☐ Every interaction and branch tested
- ☐ Accessibility checks complete
- ☐ Published package tested in the real LMS
- ☐ Final approval to launch received

Evaluation

- ☐ Pilot run and fixes applied
- ☐ 30 to 60 day follow-up scheduled
- ☐ Results compared against kickoff success measure
- ☐ Results reported and lessons documented

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