Custom eLearning Project Planning Checklist

Use this checklist before you request a quote, brief an instructional designer, convert classroom material, build in Storyline/Rise, or launch a course into an LMS. It helps surface the decisions that most often affect scope, timeline, budget, review cycles, and launch quality.

1. Business goal and audience

Done	Planning item	Notes
[ ]	Define the business problem the training is expected to solve.	
[ ]	Identify the learner groups, roles, skill levels, locations, and languages.	
[ ]	Document what learners must do differently after training.	
[ ]	Clarify whether completion, performance, compliance, or adoption is the primary measure.	
[ ]	List learner constraints: time, devices, connectivity, accessibility, and work environment.	

2. Source material and SME workflow

Done	Planning item	Notes
[ ]	Collect existing slide decks, SOPs, policies, job aids, videos, scripts, and assessments.	
[ ]	Identify the subject matter experts and final approvers.	
[ ]	Define how many review rounds are expected and who consolidates feedback.	
[ ]	Flag content that is outdated, redundant, proprietary, confidential, or legally sensitive.	
[ ]	Confirm whether the course should preserve the source structure or be redesigned from scratch.	

3. Course design and production scope

Done	Planning item	Notes
[ ]	Choose the likely format: Storyline, Rise, video, simulation, microlearning, blended, or vILT.	
[ ]	List required interactions: branching scenarios, software demos, games, practice exercises, or knowledge checks.	
[ ]	Define assessment requirements, passing score, remediation, attempts, and completion rules.	
[ ]	Estimate seat time and divide content into modules or lessons.	
[ ]	Identify graphics, animation, voiceover, video, screen recording, and custom development needs.	

4. LMS, reporting, accessibility, and localization

Done	Planning item	Notes
[ ]	Confirm the LMS and package type: SCORM 1.2, SCORM 2004, xAPI, cmi5, AICC, or web-only.	
[ ]	Define required reports: completion, score, attempts, time, question responses, or xAPI statements.	
[ ]	Document accessibility requirements, including keyboard navigation, captions, transcripts, and color contrast.	
[ ]	Identify translation/localization needs and whether source files must be translation-ready.	
[ ]	Confirm browser, device, mobile, firewall, hosting, and security requirements.	

5. Timeline, budget, and launch readiness

Done	Planning item	Notes
[ ]	Set target launch date and all internal review deadlines.	
[ ]	Identify fixed constraints: conference date, regulatory deadline, sales launch, or LMS migration.	
[ ]	Confirm budget range or production tier so recommendations fit reality.	
[ ]	Define pilot testing, QA, LMS upload, stakeholder signoff, and post-launch support needs.	
[ ]	Create a single owner for decisions, review consolidation, and launch approval.	

Recommended intake summary

When you contact a development partner, include these details: project type, audience, learner count, current materials, desired format, LMS, reporting needs, accessibility or translation requirements, timeline, budget range, and examples of courses you like or dislike.

Project type	
Audience / learners	
Existing materials	
Preferred format / tools	
LMS / reporting	
Accessibility / translation	
Timeline	
Budget range	
Primary outcome	

Need help turning this plan into a course? Preston Consulting Group builds custom eLearning, Storyline courses, Moodle LMS environments, software simulations, training videos, and multilingual learning programs. Contact info@prestonconsulting.com.