

HEADLESS LEARNING READINESS WORKSHEET

A Practical Framework for Making Learning Portable, Tactical, and Embedded

Introduction

Traditional learning often assumes that employees will leave their workflow, log into a learning portal, find the right content, consume it, and return to work.

Headless learning flips that model.

The goal isn't to eliminate your LMS. It is to make the learning inside it portable and accessible across the places where work actually happens—whether that's a CRM, Slack, SharePoint, a browser, an AI assistant, or another workflow.

Core principle: **If the training only works when someone is looking for it, it's already too late.**

Headless learning is about turning learning into a layer that follows the learner, rather than a destination they have to visit.

What You'll Build

By completing this worksheet, you'll identify:

- Where your learning currently lives
- How portable your learning assets are
- Whether employees can access guidance in the flow of work
- Whether your content answers tactical “how do I...?” questions
- Whether AI can retrieve and surface your knowledge effectively
- What you need to change in your next learning or technology rollout

Part 1: Can Your Content Escape the Portal?

Most organizations have valuable learning locked inside an LMS, knowledge base, or other destination. The first step toward headless learning is making that content surfaceable elsewhere while maintaining a single source of truth.

Ask yourself:

- Can learners access key content without logging into the LMS?
- Can one learning asset be reused across multiple tools?
- Do we have a single source of truth?
- Can content be updated without tracking down multiple versions?
- Is our content modular enough to be reused or embedded?

Our **biggest** content portability gap:

Part 2: Does Content Answer “How Do I?”

Once employees understand the why and what, they need quick answers to the how.

Pick your top 3 recurring questions:

Employee Question	Current Answer	Where Should It Appear?
How do I _____?	_____	_____
How do I _____?	_____	_____
How do I _____?	_____	_____

Can employees get these answers without leaving their workflow?

- ☐ Yes
- ☐ Partially
- ☐ No

Part 3: Is Learning Available Where Work Happens?

For your highest-priority workflow:

Workflow: _____

Where does the learner perform it?

Where could guidance appear?

- ☐ CRM / ERP
- ☐ Browser
- ☐ Slack / collaboration tools
- ☐ Knowledge base
- ☐ AI assistant
- ☐ Other: _____

What should the learner see at the moment of need?

Part 4: Can AI Find the Right Answer?

Don't just ask whether AI can create your content. Ask whether it can retrieve and surface it.

Test one question:

“How do I _____?”

Does your AI return a concise, actionable answer from your source content?

- ☐ Yes
- ☐ Partially
- ☐ No

If not, what needs to change?

Part 5: Score Your Readiness

Rate each area 1–5:

Area	Score
Content is portable	___ / 5
Guidance is in the flow of work	___ / 5
Content answers tactical “how-to” questions	___ / 5
AI can retrieve the right content	___ / 5
We design for deployment, not just creation	___ / 5
TOTAL	___ / 25

Your Next Move

Our weakest area:

The one workflow we'll improve first:

The first asset we'll make portable / embedded:
