THE L&D DISCOVERY WORKSHEET

How to Diagnose Performance Problems Before Building Training.

Introduction

Training requests rarely fail because L&D teams don't know how to build learning experiences.

They fail because the problem hasn't been properly diagnosed. A stakeholder asks for a course, a team requests a new training program, or performance drops, and L&D jumps straight to building a solution before understanding what's actually going wrong.

Alex Kinney, an Industrial-Organizational Psychologist and Director of Learning & Development at Octapharma, brings a different perspective. Having previously helped scale SaaS companies in the EdTech space as a sales leader, including at 360Learning, he draws on the principles of sales discovery to approach L&D challenges.

Instead of taking the request at face value, ask questions. Understand the gap between current and desired performance, identify what's preventing progress, and establish what success would look like before recommending an intervention.

The goal isn't to push back on every training request.

It's to understand the problem well enough to recommend the right solution, involve the people who can help, and demonstrate whether the intervention made a difference.

What You'll Build

By completing this worksheet, you'll identify:

- The performance problem behind the initial request
- The gap between current and desired outcomes
- The questions needed to uncover the root cause
- The evidence required to validate your diagnosis
- The intervention most appropriate for the problem
- The stakeholders responsible for implementation and reinforcement
- The metrics you'll use to measure success
- The next actions needed to move from diagnosis to results

Step 1: Unpack the Request

Objective
Understand what the stakeholder is asking for and why before committing to a solution.

1.1 Capture the initial request

Stakeholder: _____
Department or team: _____
What have they asked L&D to deliver?

_____
_____
What problem do they believe this will solve?

_____
_____

1.2 Run a discovery conversation

Use these questions to move beyond the initial request.

Ask the stakeholder	**What you're trying to uncover**
"Can you walk me through what's happening today?"	The current process and where things break down
"What prompted this request?"	The event or observation that exposed the problem
"Where specifically are people struggling?"	The point at which performance falls short
"What happens when this goes wrong?"	The operational or business consequences
"What have you already tried?"	Previous interventions and what they revealed
"What would you expect to change if we solved this?"	The outcome the stakeholder actually wants

Step 2: Define the Finish Line

Objective
Agree on what success looks like before deciding what to build.

2.1 Define the desired outcome

Ask the stakeholder:

- What should people do differently?
- What business outcome should improve?
- How will we know the problem is solved?

Current state: _____
Desired state: _____
Success metric: _____

2.2 Confirm the target

Measure	**Definition**
Baseline	
Target	
Measurement Owner	

Checkpoint

- The stakeholder agrees on the desired outcome.
- Success can be measured.

Step 3: Diagnose the Problem

Objective
Identify what's preventing the desired behavior.

3.1 Investigate the barriers

Possible barrier	**Definition**
Skill	
Motivation	
Process	

3.2 Record your diagnosis

Most likely cause: _____
Evidence supporting it: _____
What still needs verification? _____

Checkpoint

- The diagnosis is supported by evidence.
- I've considered causes beyond a lack of training.

Step 4: Recommend an Intervention

Objective
Match the solution to the problem you've identified.

4.1 Build your recommendation

Problem to solve: _____
Recommended intervention: _____
Why this is the right approach: _____
Who needs to be involved? _____

4.2 Validate with the stakeholder

Ask: "Based on what we've discussed, does this address the problem, or are we missing something?"
Stakeholder feedback: _____
Agreed next action: _____

Checkpoint

- The recommendation addresses the diagnosed cause.
- The stakeholder agrees on the next step.

Step 5: Measure the Impact

Objective
Determine whether the intervention improves performance.

5.1 Compare results

Metrics	Baseline	Target	Actual
Primary outcome			
Desired behavior			

5.2 Decide what happens next

What improved? _____
What still needs work? _____
Next action: _____
Owner: _____ Review date: _____

- Expand the intervention.
- Refine the solution.
- Revisit the diagnosis.
- Gather more evidence.

Final check: Can you demonstrate whether the intervention addressed the original problem? If not, use what you've learned to guide the next iteration.

Final Worksheet: Your Discovery Brief

Before closing the request, summarise your findings in one place.

Question	Answer
What was initially requested?	
What problem are we solving?	
What does success look like?	
What is causing the performance gap?	
What evidence supports our diagnosis?	
What intervention are we recommending?	
How will we measure its impact?	
What happens next, and who owns it?	

The takeaway:

Treat every training request as the beginning of a discovery conversation. Understand the problem, establish the desired outcome, investigate the barriers, and recommend a solution that can be evaluated against real results.

That is how L&D moves from fulfilling requests to helping the business solve problems.