

Preparing for your Point A experience

The questions below represent those that we will be working to answer in your Point A experience. There are a lot of them, we know. But don't worry, if you struggle to answer any of these questions on your own, just skip over those and we will be sure to help you in our time together. While crafting effective training may feel daunting, we will be walking alongside you each step of the way.

COJOURNERS

1. **The decision-maker:** Who's calling the final shots?

2. **Project managers:** Who will be daily driving the effort forward on your end? This can be best broken down by who will own each objective.

3. **Subject matter experts:** Who will be the people that are contributing to the training content?

4. **Other folks:** Who else do we need to know about or might we be working with after we get moving?

5. **And, about you:** We like asking some fun get-to-know you questions, so be ready for a question about big adventures you've taken and things you've recently learned.



GOALS

6. What are the major milestones and timelines you are hoping to achieve? We like identifying a target go-live date.

7. What's your primary qualitative objective? We like making a mantra out of it so we can achieve it together.

8. What 2-3 key results will you need to accomplish to measurably accomplish those objectives? Think in terms of cold, hard numbers that can be tracked.

9. When do you want to complete each of those key results? Give it a date.

10. Who will be responsible for each key result? Assign a directly responsible individual.



GOALS



PROJECT DETAILS

11. When are you planning to have selected your personalized training solution? Decision day.

12. When are you planning to push your new training to your learners? Launch it.

13. How many learners do you expect to onboard when going live? This could be an initial test group.

14. How many learners do you plan to have in a year from now? Make it aggressive, but achievable.



FINAL QUESTIONS

15. What are the remaining questions you have before you feel confident in moving forward? Lay it on us.

16. Is there anybody else that needs to be involved before we take our next exciting step? We like knowing everybody.

17. What can we do to improve this experience? By the end of our time we would love to learn how we can improve, so be sure to take notes.

Once you have this worksheet filled out with your team, remember to bring it with you to your Point A experience. It will make our session together that much more productive.



FINAL QUESTIONS