HR DELIVERY
Making Sure HR Delivers

D1 / TALENT DEVELOPMENT

Training Needs Analysis Working Records

104 matched forms for the Discover, Diagnose, Design, Deliver and Review toolkit.



MATCHED TO THE D1 PRACTITIONER TOOLKIT

Use the numbered procedure in the main toolkit before completing each record. Keep source evidence, interpretation, decisions and participant information appropriately protected.

D1 WORKING RECORDS / OCTOBER 2026

CONTENTS

Find the matching record.

Each form has the same identifier as its practitioner tool. Use the return-to-contents footer.

DISCOVER 003
20 records

DIAGNOSE 024
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DESIGN 046
21 records

DELIVER 068
21 records

REVIEW 090
21 records

BEFORE YOU WRITE

Use only authorised evidence. A blank field is better than an invented result.

01 / DISCOVER

Discover Working Records

Is there a worthwhile capability question, an accountable owner and permission to gather proportionate evidence?



An approved review charter, scoped population, baseline, evidence plan and explicit decision gate.

D1-D01 / REUSABLE WORKING RECORD

Test the training request

Decide whether an incoming course request warrants a capability inquiry before a programme is commissioned.

USE WITH THE MATCHED PRACTITIONER TOOL

Request, recent work example, proposed standard and decision owner.

Request

Work outcome

Example

Rival explanations

Decision

Owner

Next evidence check

EVIDENCE / VERSION / REVIEWER

D1-D02 / REUSABLE WORKING RECORD

Write the performance question

Translate a broad request into a question that can be answered using observable work evidence.

USE WITH THE MATCHED PRACTITIONER TOOL

Task description, service standard, relevant case records and sponsor confirmation.

Outcome

Task

Required standard

Population

Period

Comparison

Decision use

EVIDENCE / VERSION / REVIEWER

D1-D03 / REUSABLE WORKING RECORD

Agree sponsor success criteria

Set the result that matters and the threshold for a useful learning investment.

USE WITH THE MATCHED PRACTITIONER TOOL

Outcome measure definition, existing baseline and sponsor decision record.

Success statement

Leading behaviour

Service measure

Baseline

Review date

Sponsor

Conditions

EVIDENCE / VERSION / REVIEWER

D1-D04 / REUSABLE WORKING RECORD

Set the review boundary

Keep a learning-needs review proportionate and prevent it from turning into an undefined organisation-wide survey.

USE WITH THE MATCHED PRACTITIONER TOOL

Commissioning brief, organisation structure, task scope and risk log.

In scope

Out of scope

Affected groups

Referral owner

Change trigger

Approval

EVIDENCE / VERSION / REVIEWER

D1-D05 / REUSABLE WORKING RECORD

Map decision and evidence owners

Identify who can supply evidence, agree standards, remove barriers and authorise action.

USE WITH THE MATCHED PRACTITIONER TOOL

Role descriptions, process ownership and access permissions.

Actor	**Interest**
Evidence held	**Authority**
Participation method	**Escalation route**

EVIDENCE / VERSION / REVIEWER

D1-D06 / REUSABLE WORKING RECORD

Trace strategy to critical work

Connect the inquiry to strategic outcomes and the tasks that must be performed to achieve them.

USE WITH THE MATCHED PRACTITIONER TOOL

Strategy, service measures, task maps and practitioner accounts.

Outcome

Contributing process

Task

Required capability

Other conditions

Evidence link

EVIDENCE / VERSION / REVIEWER

D1-D07 / REUSABLE WORKING RECORD

Classify the work failures

Describe the actual pattern of errors or delays before choosing a diagnosis method.

USE WITH THE MATCHED PRACTITIONER TOOL

De-identified cases, service logs, complaints or rework records.

Case reference

Task

Failure category

Consequence

Context

Counterexample

EVIDENCE / VERSION / REVIEWER

D1-D08 / REUSABLE WORKING RECORD

Separate mandatory learning

Keep legal, safety and professional requirements visible without forcing them through a discretionary return-on-investment ranking.

USE WITH THE MATCHED PRACTITIONER TOOL

Approved policy, regulator or professional body requirement and current completion records.

Requirement

Authority

Population

Due date

Evidence

Gap

Owner

Review

EVIDENCE / VERSION / REVIEWER

D1-D09 / REUSABLE WORKING RECORD

Audit the course-request backlog

Reveal demand patterns and duplicate requests without treating popularity as proof of a learning need.

USE WITH THE MATCHED PRACTITIONER TOOL

Request register, programme calendar, business plans and requester notes.

Request

Task

Audience

Reason

Evidence supplied

Duplicate link

Follow-up question

EVIDENCE / VERSION / REVIEWER

D1-D10 / REUSABLE WORKING RECORD

Inventory roles and critical tasks

Identify the work that the review must assess, including tasks not obvious from job titles alone.

USE WITH THE MATCHED PRACTITIONER TOOL

Approved job descriptions, process maps, work samples and manager/employee accounts.

Role

Task

Frequency

Consequence

Current standard

Future change

Owner

EVIDENCE / VERSION / REVIEWER

D1-D11 / REUSABLE WORKING RECORD

Triage task criticality

Allocate diagnostic effort to work where a capability gap would matter most.

USE WITH THE MATCHED PRACTITIONER TOOL

Incident history, service risk, task volumes and future-work plans.

Task

Criteria

Evidence

Judgement

Uncertainty

Review priority

EVIDENCE / VERSION / REVIEWER

D1-D12 / REUSABLE WORKING RECORD

Choose the four analysis lenses

Locate the need across Enterprise, Function and process, Role and team, and Individual levels.

USE WITH THE MATCHED PRACTITIONER TOOL

Strategy, workflow, role standards, work evidence and participant accounts.

Lens	Decision question
Evidence	Owner
Dependency	Exclusion reason

EVIDENCE / VERSION / REVIEWER

D1-D13 / REUSABLE WORKING RECORD

Agree evidence access

Secure the minimum work records and observations needed for a credible review.

USE WITH THE MATCHED PRACTITIONER TOOL

Data inventory, access approval and sample record.

Evidence item

Purpose

Custodian

Sensitivity

Access decision

Retention

Fallback

EVIDENCE / VERSION / REVIEWER

D1-D14 / REUSABLE WORKING RECORD

Protect participation and fairness

Set conditions for safe, accessible input and proportionate reporting.

USE WITH THE MATCHED PRACTITIONER TOOL

Participant notice, access arrangements, reporting plan and concern route.

Participation route

Accommodation

Consent/use notice

Reporting threshold

Concern owner

EVIDENCE / VERSION / REVIEWER

D1-D15 / REUSABLE WORKING RECORD

Set the evidence standard

Agree what would count as direct evidence of proficiency or a work-system barrier.

USE WITH THE MATCHED PRACTITIONER TOOL

Task standard, source records, sample plan and calibration criteria.

Claim

Direct indicator

Source

Sample rule

Reviewer

Confidence

Contrary evidence

EVIDENCE / VERSION / REVIEWER

D1-D16 / REUSABLE WORKING RECORD

Define the baseline

Capture the starting work position so later improvement can be evaluated honestly.

USE WITH THE MATCHED PRACTITIONER TOOL

Operational extracts, work samples and measure definitions.

Measure

Formula

Source

Period

Sample

Exclusions

Baseline

Limitation

EVIDENCE / VERSION / REVIEWER

D1-D17 / REUSABLE WORKING RECORD

Plan employee and manager input

Hear the people who perform and supervise the work without making their opinions the whole evidence base.

USE WITH THE MATCHED PRACTITIONER TOOL

Population list, sampling rationale, invitation, accessibility check and feedback plan.

Group

Reason

Method

Invitation

Support need

Response route

Feedback date

EVIDENCE / VERSION / REVIEWER

D1-D18 / REUSABLE WORKING RECORD

Select the case sample

Choose recent work examples fairly before the diagnostic result is known.

USE WITH THE MATCHED PRACTITIONER TOOL

Case register and pre-agreed sample rule.

Case unit

Window

Selection rule

Selected count

Exclusions

Access

Limitation

EVIDENCE / VERSION / REVIEWER

D1-D19 / REUSABLE WORKING RECORD

Build the evidence timetable

Sequence standards, access, fieldwork, interpretation and decisions so the inquiry can finish usefully.

USE WITH THE MATCHED PRACTITIONER TOOL

Decision calendar, owner availability, access lead times and evaluation window.

Milestone

Owner

Prerequisite

Evidence ready

Decision

Risk

Contingency

EVIDENCE / VERSION / REVIEWER

D1-D20 / REUSABLE WORKING RECORD

Run the Discover gate

Confirm that the review is authorised, testable and proportionate before deeper diagnosis begins.

USE WITH THE MATCHED PRACTITIONER TOOL

Completed D1-D01 to D1-D19 records as selected for this assignment.

Gate decision

Evidence accepted

Conditions

Unresolved risks

Next owner

Date

EVIDENCE / VERSION / REVIEWER

02 / DIAGNOSE

Diagnose Working Records

Which gaps are demonstrated against the required work, which are still uncertain, and which are caused or reinforced by the work system?



A traceable gap and cause register with evidence confidence, contrary cases, participant feedback and an owner for every learning or non-learning issue.

D1-G01 / REUSABLE WORKING RECORD

Forecast the work before the skills

Identify a plausible future task change without presenting a forecast as an established proficiency gap.

USE WITH THE MATCHED PRACTITIONER TOOL

Approved service plans, change decisions, project milestones and task-owner accounts.

Change

Date

Task difference

Affected roles

Confidence

Trigger

Owner

EVIDENCE / VERSION / REVIEWER

D1-G02 / REUSABLE WORKING RECORD

Build the future-task scenario

Test whether a capability requirement holds under different credible work conditions.

USE WITH THE MATCHED PRACTITIONER TOOL

Planning assumptions, process design, task walk-throughs and decision-owner review.

Scenario

Assumptions

Task

Requirement

Trigger

Uncertainty

Next check

EVIDENCE / VERSION / REVIEWER

D1-G03 / REUSABLE WORKING RECORD

Check the role and grade fit

Anchor the review to approved role requirements while identifying where local work differs.

USE WITH THE MATCHED PRACTITIONER TOOL

Approved job description, role architecture, work samples and local task owner.

Role

Grade

Source version

Duty

Local task

Standard

Approval

EVIDENCE / VERSION / REVIEWER

D1-G04 / REUSABLE WORKING RECORD

Calibrate the required standard

Give reviewers a shared, observable reference before assessing current work.

USE WITH THE MATCHED PRACTITIONER TOOL

Approved guidance, de-identified work examples, role-owner decision and calibration notes.

Task	**Criterion**
Acceptable example	**Borderline example**
Disputed point	**Approver**

EVIDENCE / VERSION / REVIEWER

D1-G05 / REUSABLE WORKING RECORD

Select a defensible case sample

Choose real work examples that can test a claim without favouring only memorable failures.

USE WITH THE MATCHED PRACTITIONER TOOL

Case register, sampling rule, access permission and case metadata.

Population

Period

Inclusion rule

Selected cases

Omissions

Bias risk

Steward

EVIDENCE / VERSION / REVIEWER

D1-G06 / REUSABLE WORKING RECORD

Observe the work in context

See whether the person can perform the task under normal tools, time and support conditions.

USE WITH THE MATCHED PRACTITIONER TOOL

Observation notes, current guidance, relevant work product and participant explanation.

Task

Criterion

Observed action

Conditions

Explanation

Limitation

Reviewer

EVIDENCE / VERSION / REVIEWER

D1-G07 / REUSABLE WORKING RECORD

Review a work-product portfolio

Compare examples of completed work with the required standard and reveal variation.

USE WITH THE MATCHED PRACTITIONER TOOL

Permitted work products, approved rubric, reviewer notes and task-owner challenge.

Product

Task condition

Criterion

Observation

Reviewer difference

Conclusion

EVIDENCE / VERSION / REVIEWER

D1-G08 / REUSABLE WORKING RECORD

Run the structured interview

Gather a person's experience with the diagnostic manual's exact questions and checkable examples.

USE WITH THE MATCHED PRACTITIONER TOOL

Diagnostic manual interview cards, participant account, example reference and consent record.

Dimension

Question route

Account

Example

Counterexample

Record requested

Status

EVIDENCE / VERSION / REVIEWER

D1-G09 / REUSABLE WORKING RECORD

Facilitate different experiences

Use the manual's focus-group route to surface variation without forcing a consensus level.

USE WITH THE MATCHED PRACTITIONER TOOL

Diagnostic manual focus-group cards, private ratings, examples and facilitator notes.

Dimension

Participants

Shared pattern

Different experience

Evidence

Concern route

EVIDENCE / VERSION / REVIEWER

D1-G10 / REUSABLE WORKING RECORD

Administer the controlled survey

Collect a wider descriptive signal without changing the diagnostic instrument or treating it as a behavioural rating.

USE WITH THE MATCHED PRACTITIONER TOOL

Diagnostic manual participant form and administrator key, controlled version and response export.

Route

Version

Language

Eligible base

Missing codes

Safe reporting decision

EVIDENCE / VERSION / REVIEWER

D1-G11 / REUSABLE WORKING RECORD

Calculate a survey dimension

Produce a transparent signal while keeping scoring and practice judgement separate.

USE WITH THE MATCHED PRACTITIONER TOOL

Controlled item key, coded responses, inclusion log and calculation worksheet.

Dimension

Item IDs

Valid count

Person means

Group mean

Eligible n

Band

EVIDENCE / VERSION / REVIEWER

D1-G12 / REUSABLE WORKING RECORD

Run an evidence gallery walk

Let a larger group interrogate shared examples and reveal missing context before action selection.

USE WITH THE MATCHED PRACTITIONER TOOL

Diagnostic manual large-group method, station sheets, source references and facilitator record.

Station

Evidence

Added context

Contradiction

Owner of verification

Follow-up

EVIDENCE / VERSION / REVIEWER

D1-G13 / REUSABLE WORKING RECORD

Rank issues with parallel groups

Prioritise a small set of improvement questions while protecting quieter contributions.

USE WITH THE MATCHED PRACTITIONER TOOL

Manual's Parallel Nominal Group Technique, idea cards, rankings and evidence log.

Question

Group base

Ideas

Private ranks

Evidence required

Decision owner

EVIDENCE / VERSION / REVIEWER

D1-G14 / REUSABLE WORKING RECORD

Stress-test a decision scenario

Expose a capability or support gap by testing the same task under difficult but plausible conditions.

USE WITH THE MATCHED PRACTITIONER TOOL

Diagnostic manual scenario lab, task standard, scenario sheet and group reasoning.

Scenario

Baseline

Decision

Criterion

Variation

Explanation

Evidence check

EVIDENCE / VERSION / REVIEWER

D1-G15 / REUSABLE WORKING RECORD

Separate gap from opportunity

Avoid labelling a person unskilled when they have lacked the chance or support to demonstrate the work.

USE WITH THE MATCHED PRACTITIONER TOOL

Task allocation, work sample, observation conditions and employee/manager accounts.

Criterion

Opportunity

Observation

Missing condition

Status

Demonstration plan

EVIDENCE / VERSION / REVIEWER

D1-G16 / REUSABLE WORKING RECORD

Test competing root causes

Distinguish missing capability from expectation, workflow, tool, resource and feedback barriers.

USE WITH THE MATCHED PRACTITIONER TOOL

Case comparison, process timing, task standard, tool availability and practitioner accounts.

Observed gap

Explanation

Predicted pattern

Supporting case

Contrary case

Owner

EVIDENCE / VERSION / REVIEWER

D1-G17 / REUSABLE WORKING RECORD

Map the end-to-end friction

Find process points that make good performance hard even when staff know the task.

USE WITH THE MATCHED PRACTITIONER TOOL

Process map, timing records, case examples and cross-functional walk-through.

Step

Input

Owner

Delay or error

Cause hypothesis

Remedy owner

EVIDENCE / VERSION / REVIEWER

D1-G18 / REUSABLE WORKING RECORD

Apply the printed behaviour rules

Make a defensible 7A practice judgement against the manual's exact indicators.

USE WITH THE MATCHED PRACTITIONER TOOL

Printed dimension guide, case sample, two perspectives, record or observation and review history.

Dimension

Case base

Indicator checks

Contrary case

Supported level

Status

Reviewer

EVIDENCE / VERSION / REVIEWER

D1-G19 / REUSABLE WORKING RECORD

Build the gap-and-cause register

Give the design team a traceable set of learning needs, non-learning actions and unresolved questions.

USE WITH THE MATCHED PRACTITIONER TOOL

Work standard, observed cases, diagnostic status, cause test and owner acceptance.

Task	**Gap**
Evidence	**Cause**
Contrary evidence	**Response class**
Owner	**Confidence**

EVIDENCE / VERSION / REVIEWER

D1-G20 / REUSABLE WORKING RECORD

Return the diagnosis to participants

Test whether the interpretation reflects the work and give participants a chance to challenge it.

USE WITH THE MATCHED PRACTITIONER TOOL

Draft profile, safe feedback notes, contrary examples and sponsor decision route.

Finding

Participant response

Contrary case

Decision change

Owner

Return date

EVIDENCE / VERSION / REVIEWER

D1-G21 / REUSABLE WORKING RECORD

Run the Diagnose gate

Decide which findings are ready for investment design and which need another evidence cycle.

USE WITH THE MATCHED PRACTITIONER TOOL

Completed D1-G01 to D1-G20 records as applicable, diagnostic rules and decision log.

Accepted findings

Deferred findings

Non-learning referrals

Evidence conditions

Sponsor

Date

EVIDENCE / VERSION / REVIEWER

03 / DESIGN

Design
Working Records

Which combination of learning, workplace support and non-learning action is justified, affordable and testable?



A prioritised and costed response portfolio, approved development briefs, practice and manager-support plans, and a measurement agreement.

D1-S01 / REUSABLE WORKING RECORD

Write the need statement

Turn a supported diagnosis into a concise requirement that does not presume a course.

USE WITH THE MATCHED PRACTITIONER TOOL

Accepted gap-and-cause register, task standard and diagnostic decision.

Required work

Difference

Evidence

Cause

Uncertainty

Owner

Acceptance

EVIDENCE / VERSION / REVIEWER

D1-S02 / REUSABLE WORKING RECORD

Separate obligation from discretion

Keep mandated learning visible while allowing discretionary investments to be compared fairly.

USE WITH THE MATCHED PRACTITIONER TOOL

Verified authority, policy version, role population and compliance register.

Requirement

Authority

Population

Deadline

Completion proof

Task check

Owner

EVIDENCE / VERSION / REVIEWER

D1-S03 / REUSABLE WORKING RECORD

Build a transparent priority matrix

Compare competing needs without turning judgement into false mathematical precision.

USE WITH THE MATCHED PRACTITIONER TOOL

Accepted need statements, strategic priorities, risk information and capacity plan.

Need

Criterion

Evidence

Dependency

Proposed order

Challenge

Decision

EVIDENCE / VERSION / REVIEWER

D1-S04 / REUSABLE WORKING RECORD

Map capability dependencies

Place prerequisite knowledge, work access and manager support in the right order.

USE WITH THE MATCHED PRACTITIONER TOOL

Task analysis, subject-expert review, process conditions and approved standards.

Target task

Prerequisite

Source

Order

Enabler

Expert

Test case

EVIDENCE / VERSION / REVIEWER

D1-S05 / REUSABLE WORKING RECORD

Choose the response mechanism

Select a method because of how it changes task performance, not because it is fashionable.

USE WITH THE MATCHED PRACTITIONER TOOL

Diagnosis, task risk, learner access, work opportunities and manager capacity.

Gap

Mechanism

Response option

Practice opportunity

Constraint

Selected reason

EVIDENCE / VERSION / REVIEWER

D1-S06 / REUSABLE WORKING RECORD

Design a non-learning action

Give process, tool, expectation and capacity barriers an owned response alongside development.

USE WITH THE MATCHED PRACTITIONER TOOL

Cause register, process owner agreement, case pattern and risk control.

Barrier

Intervention

Owner

Permission

Test period

Result measure

Fallback

EVIDENCE / VERSION / REVIEWER

D1-S07 / REUSABLE WORKING RECORD

Write the development brief

Give a provider or internal designer a clear task standard, practice requirement and acceptance test.

USE WITH THE MATCHED PRACTITIONER TOOL

Approved need statement, task rubric, participant profile and governance requirements.

Task

Audience

Outcome

Cases

Practice

Assessment

Inclusion

Approval

EVIDENCE / VERSION / REVIEWER

D1-S08 / REUSABLE WORKING RECORD

Choose representative practice cases

Make practice resemble the decisions learners must make in real work.

USE WITH THE MATCHED PRACTITIONER TOOL

Permitted case library, task standard, expert answer key and privacy review.

Case

Task condition

Criterion

Difficulty

Expected rationale

Safeguard

EVIDENCE / VERSION / REVIEWER

D1-S09 / REUSABLE WORKING RECORD

Design feedback for the task

Make feedback specific enough to improve the next attempt.

USE WITH THE MATCHED PRACTITIONER TOOL

Calibrated rubric, case answer key, observation and learner reflection.

Attempt

Criterion

Feedback

Learner explanation

Retry

Remaining need

EVIDENCE / VERSION / REVIEWER

D1-S10 / REUSABLE WORKING RECORD

Plan the manager's transfer role

Make space and feedback for workplace application before the learning event begins.

USE WITH THE MATCHED PRACTITIONER TOOL

Work allocation, manager agreement, task standard and practice schedule.

Learner group

First task

Time

Manager action

Feedback

Review

Escalation

EVIDENCE / VERSION / REVIEWER

D1-S11 / REUSABLE WORKING RECORD

Make the route accessible

Remove avoidable language, format, timing and access barriers without lowering the work standard.

USE WITH THE MATCHED PRACTITIONER TOOL

Participant needs, accessibility test, translation review and task standard.

Barrier

Adjustment

Equivalent criterion

Test

Approval

Remaining risk

EVIDENCE / VERSION / REVIEWER

D1-S12 / REUSABLE WORKING RECORD

Cost the whole response

Show the real resources needed for learning, work practice and review.

USE WITH THE MATCHED PRACTITIONER TOOL

Approved rates, participant count, schedule, supplier proposal and finance assumptions.

Input	Unit
Quantity	Rate
Cost	Owner
Assumption	Exclusion

EVIDENCE / VERSION / REVIEWER

D1-S13 / REUSABLE WORKING RECORD

Test delivery capacity

Check whether people, cases, equipment and managers can sustain the intended design.

USE WITH THE MATCHED PRACTITIONER TOOL

Resource calendar, workforce schedule, mentor capacity and service demand.

Activity

Required capacity

Available capacity

Bottleneck

Alternative

Decision

EVIDENCE / VERSION / REVIEWER

D1-S14 / REUSABLE WORKING RECORD

Compare provider or build options

Select an internal or external solution against the approved development brief.

USE WITH THE MATCHED PRACTITIONER TOOL

Development brief, comparable option responses, procurement rules and expert review.

Option

Task fit

Practice

Access

Cost

Risk

Reason

Approval

EVIDENCE / VERSION / REVIEWER

D1-S15 / REUSABLE WORKING RECORD

Set the evaluation agreement

Agree what will be measured and by whom before delivery makes the original baseline hard to recover.

USE WITH THE MATCHED PRACTITIONER TOOL

Baseline, task rubric, work-system measures and sponsor decision need.

Question

Measure

Source

Baseline

Time

Limitation

Owner

Decision

EVIDENCE / VERSION / REVIEWER

D1-S16 / REUSABLE WORKING RECORD

Set a safe pilot boundary

Learn from a small implementation without putting consequential work at risk.

USE WITH THE MATCHED PRACTITIONER TOOL

Risk assessment, pilot population, task standard, baseline and sponsor approval.

Pilot scope

Supervision

Success signal

Stop rule

Data

Generalisation limit

EVIDENCE / VERSION / REVIEWER

D1-S17 / REUSABLE WORKING RECORD

Create the portfolio map

Show learning and non-learning responses, dependencies and decisions on one page.

USE WITH THE MATCHED PRACTITIONER TOOL

Accepted diagnosis, priority matrix, cost model and owner commitments.

Need

Response

Dependency

Owner

Timing

Cost

Decision

Review trigger

EVIDENCE / VERSION / REVIEWER

D1-S18 / REUSABLE WORKING RECORD

Write the investment case

Give leaders a balanced decision brief with cost, intended value and uncertainty.

USE WITH THE MATCHED PRACTITIONER TOOL

Portfolio map, full cost, baseline, task evidence and implementation constraints.

Decision

Need

Options

Cost

Benefit hypothesis

Uncertainty

Recommendation

EVIDENCE / VERSION / REVIEWER

D1-S19 / REUSABLE WORKING RECORD

Review risk and safeguards

Protect participants, clients and service quality when development touches consequential work.

USE WITH THE MATCHED PRACTITIONER TOOL

Task risk, policy, participant route, case controls and accountable owner.

Risk

Consequence

Safeguard

Owner

Residual concern

Trigger

Approval

EVIDENCE / VERSION / REVIEWER

D1-S20 / REUSABLE WORKING RECORD

Run a pre-delivery rehearsal

Check whether the intended route actually lets learners practise and demonstrate the task.

USE WITH THE MATCHED PRACTITIONER TOOL

Rehearsal notes, usability feedback, calibrated rubric and change log.

Journey step

Issue

Impact

Revision

Retest

Approver

EVIDENCE / VERSION / REVIEWER

D1-S21 / REUSABLE WORKING RECORD

Run the Design gate

Authorise a deliverable response with an explicit practice, cost and assurance plan.

USE WITH THE MATCHED PRACTITIONER TOOL

Completed D1-S01 to D1-S20 records as selected, accepted diagnosis and sponsor decision.

Approved actions

Conditions

Deferred work

Cost

Owner

Review date

Decision

EVIDENCE / VERSION / REVIEWER

04 / DELIVER

Deliver Working Records

Are the agreed learning and non-learning actions being used in real work with the promised access, practice, feedback and safeguards?



Delivery evidence, practice records, manager feedback, barrier-action status and a dated work-application sample ready for review.

D1-L01 / REUSABLE WORKING RECORD

Check launch readiness

Prevent a finished-looking programme from starting without the conditions required for application.

USE WITH THE MATCHED PRACTITIONER TOOL

Approved development brief, rehearsal findings, resource calendar and access tests.

Condition

Test

Result

Defect

Owner

Decision

Date

EVIDENCE / VERSION / REVIEWER

D1-L02 / REUSABLE WORKING RECORD

Brief sponsors and managers

Give each decision owner a precise role during delivery and workplace transfer.

USE WITH THE MATCHED PRACTITIONER TOOL

Approved portfolio, manager practice plan, barrier-action register and briefing attendance.

Owner

Commitment

Task

Time

Barrier

Confirmation

Escalation

EVIDENCE / VERSION / REVIEWER

D1-L03 / REUSABLE WORKING RECORD

Orient participants fairly

Explain why the activity exists, what will be assessed and how participants can raise concerns.

USE WITH THE MATCHED PRACTITIONER TOOL

Participant notice, task standard, accessibility plan and question log.

Group

Message

Adjustment

Question

Answer

Understanding check

Owner

EVIDENCE / VERSION / REVIEWER

D1-L04 / REUSABLE WORKING RECORD

Calibrate facilitators and reviewers

Make the standard and feedback consistent across cohorts.

USE WITH THE MATCHED PRACTITIONER TOOL

Current rubric, case key, independent judgements and expert decision.

Case

Reviewer A

Reviewer B

Disagreement

Standard decision

Version

EVIDENCE / VERSION / REVIEWER

D1-L05 / REUSABLE WORKING RECORD

Run a bounded pilot

Test the response mechanism and delivery conditions before wider use.

USE WITH THE MATCHED PRACTITIONER TOOL

Pilot charter, attendance and access record, task observations and issue log.

Pilot scope

Activity delivered

Practice exposure

Signal

Issue

Decision

EVIDENCE / VERSION / REVIEWER

D1-L06 / REUSABLE WORKING RECORD

Deliver the minimum explanation

Provide essential knowledge without allowing instruction to replace task practice.

USE WITH THE MATCHED PRACTITIONER TOOL

Approved rule, demonstration cases, learner questions and knowledge check.

Rule

Version

Demonstration

Question

Misunderstanding

Next practice

EVIDENCE / VERSION / REVIEWER

D1-L07 / REUSABLE WORKING RECORD

Run a varied practice ladder

Build task judgement across increasingly demanding examples with feedback.

USE WITH THE MATCHED PRACTITIONER TOOL

Case bank, rubric, attempts, feedback and final varied task.

Learner

Case level

Attempt

Feedback

Retry

New-case result

EVIDENCE / VERSION / REVIEWER

D1-L08 / REUSABLE WORKING RECORD

Use a decision simulation safely

Let participants rehearse consequential choices without unapproved live authority.

USE WITH THE MATCHED PRACTITIONER TOOL

Approved scenario, current guidance, decision log and expert debrief.

Scenario

Decision point

Choice

Rationale

Feedback

Safety boundary

EVIDENCE / VERSION / REVIEWER

D1-L09 / REUSABLE WORKING RECORD

Use a job aid at the task point

Put infrequent or easily forgotten rules where people make the decision.

USE WITH THE MATCHED PRACTITIONER TOOL

Approved guidance, aid prototype, user test and version control.

Task point

Aid

Version

Test case

Observed use

Defect

Owner

EVIDENCE / VERSION / REVIEWER

D1-L10 / REUSABLE WORKING RECORD

Create a peer case clinic

Help colleagues compare reasoning on difficult cases while preserving the authorised standard.

USE WITH THE MATCHED PRACTITIONER TOOL

Permitted cases, task rubric, expert response and clinic notes.

Case

Reasoning options

Controlling criterion

Insight

Unresolved issue

Owner

EVIDENCE / VERSION / REVIEWER

D1-L11 / REUSABLE WORKING RECORD

Coach the first workplace attempt

Use a real task and timely feedback to bridge learning and ordinary performance.

USE WITH THE MATCHED PRACTITIONER TOOL

Work allocation, observation, feedback record and updated action.

Learner

Task

Support

Observed decision

Feedback

Barrier

Next attempt

EVIDENCE / VERSION / REVIEWER

D1-L12 / REUSABLE WORKING RECORD

Use mentoring where expertise is scarce

Transfer expert task judgement with explicit time, boundaries and evidence.

USE WITH THE MATCHED PRACTITIONER TOOL

Mentoring agreement, task standard, schedule and reviewed attempts.

Mentor

Learner

Task

Boundaries

Session

Evidence

Capacity check

EVIDENCE / VERSION / REVIEWER

D1-L13 / REUSABLE WORKING RECORD

Implement the enabling change

Track the non-learning actions required for the capability response to work.

USE WITH THE MATCHED PRACTITIONER TOOL

Barrier register, release note or process decision, user test and case evidence.

Barrier

Action

Owner

Implementation proof

Case test

Residual issue

EVIDENCE / VERSION / REVIEWER

D1-L14 / REUSABLE WORKING RECORD

Adapt the route without changing the standard

Allow access adjustments while preserving comparable task evidence.

USE WITH THE MATCHED PRACTITIONER TOOL

Participant feedback, accessibility test, approved criterion and change log.

Barrier

Adjustment

Same criterion

Approval

Retest

Comparison limit

EVIDENCE / VERSION / REVIEWER

D1-L15 / REUSABLE WORKING RECORD

Protect data and participant trust

Keep learning evidence proportionate, private and used only for the agreed purpose.

USE WITH THE MATCHED PRACTITIONER TOOL

Participant notice, data inventory, access list and concern route.

Data item

Purpose

Access

Retention

Deletion

Concern owner

EVIDENCE / VERSION / REVIEWER

D1-L16 / REUSABLE WORKING RECORD

Monitor delivery against plan

See whether the response was actually available and completed as designed.

USE WITH THE MATCHED PRACTITIONER TOOL

Delivery log, access check, practice records and approved design.

Activity

Planned

Delivered

Subgroup

Deviation

Reason

Owner

EVIDENCE / VERSION / REVIEWER

D1-L17 / REUSABLE WORKING RECORD

Respond to a stalled learner

Offer focused support when a person has not yet demonstrated the required task.

USE WITH THE MATCHED PRACTITIONER TOOL

Task attempts, feedback, work conditions and participant account.

Criterion

Evidence

Condition

Support

New case

Review date

Status

EVIDENCE / VERSION / REVIEWER

D1-L18 / REUSABLE WORKING RECORD

Resolve delivery exceptions

Keep a controlled route for obsolete material, missed access, safety concerns and changed work requirements.

USE WITH THE MATCHED PRACTITIONER TOOL

Issue report, material version, expert decision and participant notification.

Exception

Affected group

Containment

Correction

Approval

Reassessment

EVIDENCE / VERSION / REVIEWER

D1-L19 / REUSABLE WORKING RECORD

Capture the first application sample

Collect real-work evidence once participants have had a reasonable chance to use the new capability.

USE WITH THE MATCHED PRACTITIONER TOOL

Work allocation, permitted cases, baseline definition, rubric and reviewer notes.

Person or group

Task opportunity

Case

Criterion

Observation

Limitation

EVIDENCE / VERSION / REVIEWER

D1-L20 / REUSABLE WORKING RECORD

Reconcile actions with the original need

Check that delivery has not drifted into activities detached from the diagnosed work.

USE WITH THE MATCHED PRACTITIONER TOOL

Approved portfolio, delivery log, practice records and barrier register.

Need

Planned action

Delivered action

Evidence

Drift

Decision

EVIDENCE / VERSION / REVIEWER

D1-L21 / REUSABLE WORKING RECORD

Run the Deliver gate

Hand over a truthful account of what was delivered and what can now be reviewed.

USE WITH THE MATCHED PRACTITIONER TOOL

Completed D1-L01 to D1-L20 records as selected, approved plan and first application sample.

Delivered

Applied

Not yet tested

Barrier status

Owner

Review date

EVIDENCE / VERSION / REVIEWER

05 / REVIEW

Review
Working Records

What changed in capability and work, what else could explain it, and should the response continue, adapt, scale or stop?



A transparent application and outcome review, participant feedback, a reasoned investment decision and a refreshed capability question where the work has changed.

D1-R01 / REUSABLE WORKING RECORD

Reopen the original decision

Keep the review anchored to the work question that justified the investment.

USE WITH THE MATCHED PRACTITIONER TOOL

Design gate, metric dictionary, task rubric and change history.

Original question

Baseline

Change

Comparability

Review period

Owner

EVIDENCE / VERSION / REVIEWER

D1-R02 / REUSABLE WORKING RECORD

Reconcile reach and exposure

Show who could actually access the designed response and who could not.

USE WITH THE MATCHED PRACTITIONER TOOL

Eligibility list, delivery record, practice log and access register.

Eligible base

Invited

Participated

Practised

Excluded

Difference

Limit

EVIDENCE / VERSION / REVIEWER

D1-R03 / REUSABLE WORKING RECORD

Review what was learned

Assess task knowledge or judgement demonstrated during the learning route.

USE WITH THE MATCHED PRACTITIONER TOOL

Case rubric, task attempts, assessor notes and versioned case set.

Criterion	Early attempt
Later attempt	Support
Result	Limitation

EVIDENCE / VERSION / REVIEWER

D1-R04 / REUSABLE WORKING RECORD

Compare workplace application

Test whether the capability is being used in the work it was meant to improve.

USE WITH THE MATCHED PRACTITIONER TOOL

Baseline and later cases, rubric, work allocation and reviewer record.

Case period

Selection

Criterion

Observed use

Condition

Difference

Caveat

EVIDENCE / VERSION / REVIEWER

D1-R05 / REUSABLE WORKING RECORD

Check manager support actually occurred

Evaluate the transfer condition promised in the approved design.

USE WITH THE MATCHED PRACTITIONER TOOL

Manager practice plan, work allocation, feedback notes and participant account.

Planned support

Delivered support

Task

Feedback quality

Barrier

Owner

EVIDENCE / VERSION / REVIEWER

D1-R06 / REUSABLE WORKING RECORD

Review the non-learning actions

Establish whether process and tool changes addressed their part of the diagnosed gap.

USE WITH THE MATCHED PRACTITIONER TOOL

Barrier register, implementation proof, user test and case pattern.

Barrier

Action

Actual use

Case result

Residual issue

Owner

EVIDENCE / VERSION / REVIEWER

D1-R07 / REUSABLE WORKING RECORD

Review the 7A survey signal

Use a repeat survey descriptively without changing the controlled diagnostic scoring rules.

USE WITH THE MATCHED PRACTITIONER TOOL

Versioned diagnostic instrument, response exports, scoring key and population comparison.

Dimension

Period

Version

Eligible n

Mean

Missing

Comparison limit

EVIDENCE / VERSION / REVIEWER

D1-R08 / REUSABLE WORKING RECORD

Reassess organisational practice

Use the manual's exact behaviour guide to decide whether a 7A practice level is now supported.

USE WITH THE MATCHED PRACTITIONER TOOL

Diagnostic behaviour guide, cases, two perspectives, observation and review history.

Dimension

Indicators

Cases

Perspectives

Supported level

Status

Next check

EVIDENCE / VERSION / REVIEWER

D1-R09 / REUSABLE WORKING RECORD

Compare experiences fairly

Find whether a broad improvement conceals a group with less access or a different work barrier.

USE WITH THE MATCHED PRACTITIONER TOOL

Safe reporting plan, work allocation, task results and participant feedback.

Group

Reporting base

Opportunity

Result

Difference

Safe follow-up

EVIDENCE / VERSION / REVIEWER

D1-R10 / REUSABLE WORKING RECORD

Inspect contrary and failed cases

Learn from exceptions that challenge a positive summary.

USE WITH THE MATCHED PRACTITIONER TOOL

Case samples, reviewer notes, process conditions and affected-worker account.

Contrary case

Context

Possible cause

Evidence needed

Safeguard

Owner

EVIDENCE / VERSION / REVIEWER

D1-R11 / REUSABLE WORKING RECORD

Check other causes of change

Keep attribution proportionate when several things changed around the same time.

USE WITH THE MATCHED PRACTITIONER TOOL

Change log, service metrics, case evidence and owner accounts.

Observed change

Concurrent event

Plausible pathway

Counterexample

Claim limit

EVIDENCE / VERSION / REVIEWER

D1-R12 / REUSABLE WORKING RECORD

Reconcile resources used

Show the actual cost and capacity consumed compared with the approved case.

USE WITH THE MATCHED PRACTITIONER TOOL

Approved cost model, invoices, schedules, time records and finance confirmation.

Resource

Budget

Actual

Unit

Variance

Reason

Future obligation

EVIDENCE / VERSION / REVIEWER

D1-R13 / REUSABLE WORKING RECORD

Interpret the business measure

Show whether the work outcome moved and how confidently it relates to the response.

USE WITH THE MATCHED PRACTITIONER TOOL

Metric dictionary, baseline and follow-up data, task sample and change timeline.

Measure

Denominator

Baseline

Follow-up

Context

Contribution

Caveat

EVIDENCE / VERSION / REVIEWER

D1-R14 / REUSABLE WORKING RECORD

Test the benefit sensitivity

Show leaders how a conclusion changes when uncertain inputs move.

USE WITH THE MATCHED PRACTITIONER TOOL

Actual cost, measured work result, approved value assumption and finance review.

Assumption

Source

Low

Central

High

Decision effect

Next measurement

EVIDENCE / VERSION / REVIEWER

D1-R15 / REUSABLE WORKING RECORD

Check sustained use

Look beyond the first successful attempt to see whether the practice remains useful.

USE WITH THE MATCHED PRACTITIONER TOOL

Later cases, guidance version, support record and task change log.

Later period

Case mix

Task use

Support

Change

Sustainment action

EVIDENCE / VERSION / REVIEWER

D1-R16 / REUSABLE WORKING RECORD

Invite participant and client feedback

Test whether the response was useful and whether it created unintended effects.

USE WITH THE MATCHED PRACTITIONER TOOL

Safe feedback route, work examples, client experience data where authorised and concern log.

Perspective

Reported change

Example

Verification

Concern

Reply owner

EVIDENCE / VERSION / REVIEWER

D1-R17 / REUSABLE WORKING RECORD

Run the evidence review meeting

Let decision owners challenge the finding before committing to the next investment.

USE WITH THE MATCHED PRACTITIONER TOOL

Evaluation agreement, full results profile, cost record and participant feedback.

Finding

Evidence

Challenge

Alternative

Decision

Owner

Next review

EVIDENCE / VERSION / REVIEWER

D1-R18 / REUSABLE WORKING RECORD

Decide whether to scale

Expand only when the task need, response mechanism and supporting capacity still hold.

USE WITH THE MATCHED PRACTITIONER TOOL

Pilot review, target-population task analysis, capacity plan and sponsor approval.

Receiving group

Similarity

Capacity

Adaptation

Hold point

Approval

EVIDENCE / VERSION / REVIEWER

D1-R19 / REUSABLE WORKING RECORD

Adapt, defer or stop an action

Make a clear decision when the evidence or operating conditions do not support continuation.

USE WITH THE MATCHED PRACTITIONER TOOL

Delivery deviations, task evidence, participant feedback and cost record.

Action

Issue

Cause

Option

Decision

Communication

Revisit trigger

EVIDENCE / VERSION / REVIEWER

D1-R20 / REUSABLE WORKING RECORD

Refresh the capability question

Return to Align when work, strategy or evidence has changed enough to require a new review.

USE WITH THE MATCHED PRACTITIONER TOOL

Current work plan, later cases, change decisions and prior D1 records.

Original need

Change

New question

Retired item

Owner

Next evidence

EVIDENCE / VERSION / REVIEWER

D1-R21 / REUSABLE WORKING RECORD

Run the Review gate

Close the decision loop with an honest account of value, limits and next action.

USE WITH THE MATCHED PRACTITIONER TOOL

Completed D1-R01 to D1-R20 records as selected, original charter and sponsor review.

Decision

Evidence

Limits

Cost

Owner

Communication

Next review

EVIDENCE / VERSION / REVIEWER

SOURCE AND BOUNDARY

Use the main toolkit.

These records are a companion to the D1 Training Needs Analysis practitioner edition.

The main toolkit explains how to perform each numbered activity and includes an illustrative completed record. The HR Delivery 7A framework controls the decision path. The published 95-page diagnostic manual controls exact questions, survey scoring and behaviour-level evidence rules. The 130-page ebook provides extended learning context.

These are reusable working records, not diagnostic results. Use the original manual for exact instruments and scoring rules, and retain local evidence and approvals with each completed record.