

Instructional Design

Scope of Work Outline

Project Kickoff

1. Instructional Designer name:
2. SME name:
3. Kickoff call date and time:
4. Contact details:

Phase 1: Establishing Relationship with SME


1. What drew you to this field?
2. What's most important to you about how you teach this topic?
3. If there's one thing your message should leave in people's minds, what is it?

Phase 2: Setting up a Shared Vision

1. Who is the audience?
2. What does the audience need?
3. Will the final product be a manual, an eLearning course, a video course, a training guide, or something else?
4. What topics will it cover?
5. How long will it be?
6. Notes about the project specifications:

Housekeeping details:

1. Communication method (phone, video chat, email, text, in person, etc.)?
2. How do you like to give feedback to me, and how do you like to receive feedback from me?
3. SME availability and yours (are you fully devoted to this project, both juggling this and others, etc.)

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4. Big events on your calendars (Is there anything coming up in your schedule or personal life that might impact the project? If so, how can we plan around it?)
 5. An open understanding of budget if it's a part of your project--getting a sense for what the availability is even if you aren't finalizing.

Phase 3: Building a Schedule

1. Are you open to using project managing resources like Monday, Trello, Asana etc... to stay organized with deliverables?
2. Project completion date:
3. Project start date:
4. Project task list:
5. Project milestone list:
6. Sequenced schedule:
7. Accountability notes:



The above information was adapted and edited from Jolie Miller at lynda.com