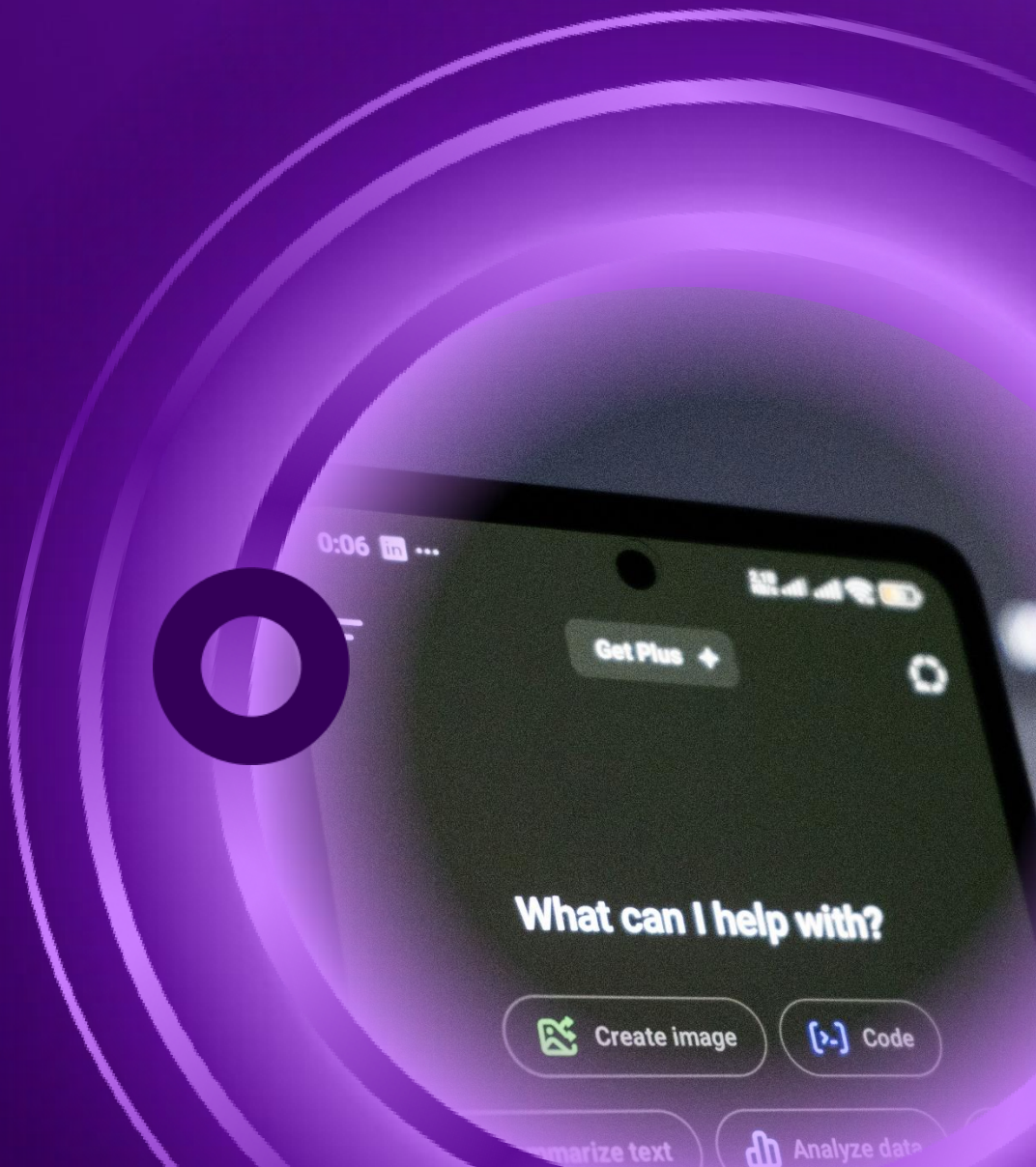
Excel Communications
Learn · Grow · Succeed

# Your AI L&D Planning Assistant

12 connected, copy-and-paste AI prompts to help you build or strengthen an L&D plan that's right for your business.

- **A detailed L&D plan** tailored to your organisation
- **An executive version** tailored to your audience
- **A plan health check** to identify what needs strengthening




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Introduction

# Can AI Build Your Learning Plan In 30 Seconds?

**Yes. Yes it can.**

**Would we encourage you to do it this way though... absolutely not.**

If you're going to build a learning plan that's tailored to your organisation and what it's trying to achieve, you need to do much more than open your favourite AI tool and type:

"Create a brilliant learning plan for [your company name]."

To get something that you can actually use, it does require a little more time and effort. That's where this guide comes in.

We've already done the prompting work for you. You bring what you know about your business, your people and your priorities, and use the prompts to build a learning plan that actually fits your organisation.

And if you've already got a plan, there's no need to start again.

We've also included bonus prompts to help you review what you've developed, challenge the assumptions behind it and identify anything that might need strengthening.

Whether you're starting from scratch or building on work you've already done, the aim is the same: a better-informed plan that makes sense for your organisation.

Simply copy the prompt and paste it into your chosen AI tool.

That's the technical bit taken care of.

# How To Use

This guide gives you **two ways** to get started.

Building or developing an L&D plan? The 12 connected prompts will guide you through the planning process, from understanding business priorities and identifying capability gaps to developing your strategy, implementation and measurement approach.

If you're starting from scratch, work through the prompts in order. If you've already begun developing a plan, you can share what you've got as part of the conversation and use the prompts to question, develop and strengthen your thinking.

Keep everything in the same AI conversation so each stage builds on what you've already discussed. By the end, you'll have a detailed working plan ready to review and discuss with the people involved.

Already got an L&D plan you'd like to review? You don't need to work through all 12 stages.

Head straight to the bonus prompt, Review My Existing L&D Plan **(Page 23).** You can upload or paste your plan, provide some context about your organisation and let the AI challenge your thinking, identify potential gaps and suggest what needs strengthening.

You can also use the Convert bonus to turn your plan into something ready to present.

If you're following the full 12-stage process, give it a little space.

Block out some time in your calendar and maybe put the kettle on. Gather whatever useful information you already have to hand. You don’t need to finish everything in one sitting, and you definitely don’t need to have all the answers before you begin. But the more thought and useful context you put into the process now, the stronger your plan will be and the less guesswork you should have to deal with later.

If you're following the 12-stage process, begin by opening the AI chat tool of your choice and copying in the Master Prompt. You don’t need to add anything to it. It’s simply there to create the foundation of the conversation from which you and AI will build your plan.

Once your AI has indicated that it has understood the Master Prompt, you can begin by copying and pasting Prompt 2.

From there, the AI will ask you for whatever information it needs at each stage. You can type or dictate your answers, or upload relevant documents, notes, reports or other files if your AI tool supports it.

You don’t need perfectly prepared answers. Rough notes are fine. Give it whatever you’ve got and let the conversation develop from there.

The AI will ask clarifying and follow-up questions where it needs more information, where something is unclear or where your assumptions need challenging. These questions are an important part of the process. They are what help turn a fairly generic AI response into an L&D plan that’s specific to your organisation.

Once the AI has enough information for that stage, it will tell you that it’s ready for the next prompt.

Where possible, keep all 12 prompts in the same AI conversation so each one can build on everything you've already discussed.

Some AI tools or plans may limit the length of a conversation, the number of messages you can send or the features available to you. If you reach a limit and need to start a new conversation, ask the AI to create a concise summary of everything established so far. Paste that summary into the new conversation, followed by the Master Prompt, and tell the AI which prompt you're ready to continue from.

Prefer to talk it through with someone? If you'd rather build your L&D plan with one of our learning consultants, **you can book a discovery call with Excel Communications here.**

# A Quick Note On Company Information

Use whatever AI tools your organisation permits and follow your internal policies on AI. Be particularly careful with personal information, confidential business information, commercially sensitive material and anything else your organisation wouldn't want shared with an external service. If you can't share something, describe it more generally.

The planning conversation can still be useful without knowing everyone's name, salary and deepest corporate secrets.

How To Use

# The Prompting Journey

Below is an overview of the journey the prompts will take you on and what each stage is there to help you work out. They are designed to be used in order, with each prompt building on the conversation that came before it. By the time you reach the final prompt, the AI should have a much clearer picture of your organisation, your people, the gaps you're trying to address and what a realistic learning plan could look like.

The first prompt is slightly different. The **Master Prompt** sets the rules for the whole conversation. It tells the AI how to behave, what to challenge, what not to assume and how much information it should gather before moving on. It's worth using even if you already use AI regularly. Good AI work isn't just about asking a clever question. It's about setting the right parameters for the conversation before you start.

| Prompt | Focus | Function |
|---|---|---|
| 1 | **Master Prompt** | Sets the rules, behaviours and parameters for the whole conversation. |
| 2 | **Business priorities** | What is the organisation actually trying to achieve? |
| 3 | **Audience** | Who really needs development? |
| 4 | **Current performance** | What is happening now and what do we actually know? |
| 5 | **Gap analysis** | What is really getting in the way? |
| 6 | **Resources and constraints** | What can we realistically do? |
| 7 | **External perspective** | What is happening outside our organisation that should influence our thinking? |
| 8 | **Learning strategy** | What should the learning actually look like? |
| 9 | **Implementation** | How will this happen? |
| 10 | **Stakeholder alignment** | Who needs to be on side? |
| 11 | **Measurement** | How will we know whether anything changed? |
| 12 | **Complete plan** | Turn the whole conversation into a practical L&D plan, tailored to the people you need to present it to. |
| Bonus Prompts | **Challenge, Review, Convert** | Use the AI to challenge your plan, review an existing plan or convert your plan into something ready to present. |

How To Use

# Remember

AI gives you better answers when it has better information to work with.

The more useful context you can give it about your organisation, your people, your priorities and the realities you are working within, the more relevant and detailed your plan is likely to be.

That doesn't mean sharing everything. Use only AI tools approved by your organisation and follow your company's policies on confidential information, personal data and what can or cannot be uploaded or shared.

Within those boundaries, give the AI what you've got. It doesn't need to be neatly written, perfectly organised or expressed in L&D language.

- This shouldn't feel like filling in another form. give the AI whatever you've got
- Dictate your thoughts instead of typing them neatly, if your AI tool supports voice
- Upload a photo of handwritten notes or a whiteboard, if your AI tool supports images
- Upload an existing strategy, brief, survey summary or other relevant document
- Answer the AI's follow-up questions one at a time as the conversation develops
- Your notes don't need to be organised. You don't need to use specialist terminology, and you definitely don't need to know all the answers before you start.

# A Quick Note On AI Outputs

AI tools can produce different results depending on the platform, model, information you provide and how the conversation develops. We've designed these prompts to improve the quality of that conversation, but we can't guarantee or control the outputs generated by your chosen AI tool.

Treat the final plan as a working draft. Check important assumptions, figures and recommendations before acting on them, and involve the right people in your organisation before making decisions.

AI can help you question, organise and strengthen your thinking. But it can't replace the judgement, context and experience of the people who shape the plan, make the decisions and ultimately put it into practice.

# Prompt 1 – Master Prompt

From here, you'll work through the prompts in sequence.

Keep everything in the same AI conversation so each stage can build on what came before. You don't need to complete the whole process in one sitting. If a prompt uncovers something you need to check, research or discuss with someone else, stop and come back to it when you are ready.

The aim is not to race through all 12 prompts. It's to give the AI enough useful context to question your thinking, spot gaps and help you build a plan that stands up to scrutiny. When you're ready, copy the prompt below and paste it into your chosen AI tool.

The Master Prompt begins on page 7.

## Prompt 1

PROMPT 1: MASTER PROMPT

I want you to act as an experienced Learning & Development consultant and help me build a practical, commercially credible L&D plan.

We will work through the planning process one stage at a time. Your job is to help me understand what the business and its people actually need, challenge weak assumptions, identify missing information and make sensible L&D decisions.

THROUGHOUT THIS CONVERSATION:

Use everything I have already shared, including notes, documents, images and other context. Ask when something important is unclear rather than making assumptions.

Connect L&D decisions to business priorities, performance and behaviour change. Do not assume every business or performance problem is a learning problem. Consider knowledge, skills, confidence, mindset, working environment, management, processes, systems, incentives and other relevant factors.

Distinguish between what is known, assumed and still unresolved. Never invent information about my organisation. Challenge weak reasoning and help me decide whether missing information is needed now, can be investigated later or is not essential.

Take practical constraints seriously, including budget, learner time, manager time, geography, culture, technology, accessibility, internal capability and operational pressures.

Focus on behaviour change and application at work rather than learning activity for its own sake. Use clear business language and avoid unnecessary L&D jargon. Do not recommend learning formats, AI or technology simply because they are popular.

When I ask for current external research, use live sources where available. Never present information as current if you cannot verify it, and provide sources for specific statistics, benchmarks and factual claims.

HOW TO HANDLE EACH STAGE

1. Review everything already discussed and use any new information I provide as your starting point.
2. Identify only missing information that would materially improve the plan.
3. Ask no more than 1 to 3 short clarification questions at a time. If one answer could affect what you need to ask next, wait for my response.
4. Ask targeted follow-up questions where you find important gaps, contradictions, weak assumptions or answers that need exploring further. Don't simply accept my first answer, particularly if it's vague, unsupported by evidence or jumps straight to a solution. Challenge my thinking and ask for examples, evidence or alternative explanations where these could materially improve the plan. Continue probing until you have enough information to make a useful judgement. Don't ask questions simply for completeness.
5. Keep responses concise and do not repeatedly paraphrase what I have just told you.
6. Do not move to the next stage yourself and do not create the full L&D plan progressively. The detailed strategic output comes at the end.

Before completing each stage, check whether we've explored the issue deeply enough to make a useful decision, rather than simply accepting my answers.

If important evidence is missing, identify what information would help, where it might be found and which decisions remain provisional. Do not invent answers or prevent us progressing indefinitely if the information is not available. Instead, make the uncertainty clear and carry it forward.

If more questioning could materially improve our understanding, continue asking concise follow-up questions.

When you have enough information to continue responsibly, say: "I have enough information to complete this stage."

Then give me a short summary using only:

WHAT WE ESTABLISHED: The most important conclusions.

WHAT REMAINS UNCERTAIN: Important assumptions, missing evidence or unanswered questions.

CARRY FORWARD: What should influence the later stages.

Keep the summary concise, normally no more than 150 words. Then finish with: "Stage complete. You can now paste the next prompt."

Confirm that you understand. Do not begin the planning process yet.

Prompt 2

# Prompt 2 – Business Priorities

**What are we working out?**

What does the organisation actually need to achieve, and what might people need to do differently for that to happen?

**What happens next?**

Copy and paste the prompt below into the same AI conversation.

The AI will start by asking you what you already know about your organisation, its priorities, pressures, changes, what L&D is being asked to support and what success might look like.

You can type or dictate your answer, or upload relevant documents, plans, briefings or other files if your AI tool supports it.

Rough notes are fine. You don't need to answer everything at once or have all the information before you begin.

The AI will ask follow-up questions where it needs more detail and will tell you when it has enough information for you to move on to Prompt 3.

PROMPT 2: BUSINESS PRIORITIES

We need to understand what the organisation is actually trying to achieve before deciding what learning it might need.

Start by asking me to share whatever I already know about the organisation, its priorities, pressures, changes, what L&D is being asked to support and what success might look like. Make it clear that rough notes are fine and I can type or dictate my answer, or upload relevant documents, plans, briefings or other files if my AI tool supports it.

Use what I provide, together with everything else already shared in this conversation.

Help me understand the most important business outcomes, any performance problems connected to them, what people may need to do differently, possible capability implications, and which parts are evidence and which are still assumptions.

Where important information is missing, ask concise questions to fill the gaps. Do not ask about every area automatically. Only ask where the answer would materially improve our understanding.

Do not assume that every business priority requires an L&D intervention. Challenge me if I appear to be jumping too quickly from a business problem to a training solution.

Continue asking concise clarification and follow-up questions until you have enough information. Then complete the stage using the short summary format agreed in the Master Prompt.

Prompt 3

# Prompt 3 – Audience

**What are we working out?**

Who actually needs development, and are there meaningful differences between those groups?

**What happens next?**

Copy and paste the prompt below into the same AI conversation.

The AI will start by asking what you already know about the people or groups involved. This might include teams, roles, levels, locations, languages, approximate learner numbers, experience levels or any groups causing particular concern.

You can type or dictate your answer, or upload relevant workforce information, organisational charts, role profiles or other files if your AI tool supports it.

Rough notes are fine. You don't need to cover every area. The AI will ask follow-up questions where the differences between groups could genuinely affect the learning strategy.

Once it has enough information, it will tell you that you are ready to move on to Prompt 4.

PROMPT 3: AUDIENCE

Now help me understand who this L&D plan actually needs to serve.

Start by asking me to share whatever I already know about the people or groups involved. Make it clear that rough notes are fine and I can type or dictate my answer, or upload relevant organisational information, workforce data, role profiles or other files if my AI tool supports it.

Use what I provide, together with the business priorities and required behaviours we established in Prompt 2.

Where relevant, help me explore teams or departments, roles or levels, locations or languages, approximate learner numbers, experience levels, groups causing particular concern and known differences between audiences.

Help me identify meaningful differences that could affect what people need, the context in which they need to use it, existing capability, motivation or confidence, manager support, opportunities to practise, geography, language or culture, technology confidence and urgency of need.

Do not create different learner groups simply to make the plan appear sophisticated. Only separate audiences where the difference should genuinely affect the learning strategy.

Do not ask about every area automatically. Only ask where the answer would materially improve the plan.

Continue asking concise clarification and follow-up questions until you have enough information. Then complete the stage using the short summary format agreed in the Master Prompt.

Prompt 4

# Prompt 4 – Current Performance

**What are we working out?**

What is actually happening now, and how much of what we think we know is backed by evidence?

**What happens next?**

Copy and paste the prompt below into the same AI conversation.

The AI will start by asking what evidence, observations or information you already have about current performance. This might include performance data, employee or customer feedback, surveys, business metrics, manager observations, examples of good or poor performance, or things people in the organisation regularly say.

You can type or dictate your answer, or upload relevant reports, survey results, dashboards, feedback summaries or other files if your AI tool supports it.

If you've got very little evidence, that's fine. The AI will help you separate what is known from what is anecdotal, perceived or assumed, and identify practical information that could strengthen the baseline.

Once it has enough information, it will tell you that you are ready to move on to Prompt 5.

PROMPT 4: CURRENT PERFORMANCE AND BASELINE

Help me establish what is actually happening now before we decide what needs fixing.

Start by asking me to share whatever evidence, observations or information I already have about current performance. Make it clear that rough notes are fine and I can type or dictate my answer, or upload relevant data, surveys, reports, feedback summaries or other files if my AI tool supports it.

Use what I provide, together with everything already established in this conversation.

Where relevant, help me explore performance data, employee feedback, manager observations, customer feedback, surveys, business metrics, examples of good or poor performance and things people in the organisation regularly say.

Help me distinguish between evidence, anecdote, perception and assumption.

Look for both areas where performance appears weak or inconsistent and things people are already doing well that we should protect or build on.

If the baseline is weak, help me identify practical information we may already have access to that would strengthen it. Do not invent benchmarks, figures or evidence.

Before completing this stage, identify the most important gaps in our evidence. Where useful, suggest existing sources of information we could investigate, such as performance reports, customer feedback, employee surveys, operational metrics or manager observations. Focus on information that could genuinely change our understanding or recommendations.

If this evidence isn't currently available, explain why it matters, what decisions it could influence and how we might obtain it. Do not invent figures or treat assumptions as established facts. Make clear which conclusions are provisional so we can return to them when better information becomes available.

Do not ask about every area automatically. Only ask where the answer would materially improve our understanding.

Continue asking concise clarification and follow-up questions until you have enough information. Then complete the stage using the short summary format agreed in the Master Prompt.

Prompt 5

# Prompt 5 – Gap Analysis

**What are we working out?**

What is actually preventing the required performance?

**What happens next?**

Copy and paste the prompt below into the same AI conversation.

The AI will start by asking whether you've got any additional information about possible causes, barriers, confidence or motivation, systems or processes, management behaviour or future capability needs.

You can type or dictate your answer, or upload relevant reports, feedback, process information or other files if your AI tool supports it.

If you've got nothing else to add, that's fine. Most of the information for this stage should already be in the conversation.

The AI will help you separate symptoms from underlying causes, distinguish genuine capability gaps from wider organisational barriers, and identify which gaps matter most.

Once it has enough information, it will tell you that you are ready to move on to Prompt 6.

PROMPT 5: GAP ANALYSIS

Using everything we have established so far, help me diagnose what is actually preventing the required performance.

Start by asking whether I have any additional information about possible causes, barriers, confidence or motivation, systems or processes, management behaviour or future capability needs. Make it clear that I can simply say I have nothing additional, type or dictate rough notes, or upload relevant files if my AI tool supports it.

Do not assume that a performance problem automatically means people need training.

Where useful, distinguish between:

KNOWLEDGE: People do not know or understand something they need.

SKILL: People understand what to do but cannot yet do it effectively.

CONFIDENCE OR MINDSET: Confidence, motivation, judgement, beliefs or attitudes are affecting behaviour.

WORKING ENVIRONMENT: Processes, systems, workload, incentives, leadership, culture, management or other conditions are getting in the way.

FUTURE CAPABILITY: Something people may need within the next 12 to 24 months even if it is not yet causing a performance problem.

Challenge me if I appear to be describing a symptom rather than an underlying cause. Do not classify something as a capability gap unless the information we have reasonably supports it.

Help me identify which gaps matter most based on business importance, urgency, number of people affected and likely difficulty of closing the gap.

Do not ask questions simply to complete every category. Only explore areas that could materially affect the diagnosis.

Continue asking concise clarification and follow-up questions until you have enough information. Then complete the stage using the short summary format agreed in the Master Prompt.

Prompt 6

# Prompt 6 – Resources And Constraints

**What are we working out?**

What can we realistically do with the budget, time, people and resources available?

**What happens next?**

Copy and paste the prompt below into the same AI conversation.

The AI will start by asking what you already know about the resources and constraints affecting the plan. This might include budget, timescale, internal L&D capacity, subject matter experts, existing learning content, technology, learner or manager availability, operational pressures, geography, language or accessibility.

You can type or dictate your answer, or upload relevant budgets, plans, schedules, platform information or other files if your AI tool supports it.

You don't need to know everything. The AI will help you identify the constraints that genuinely limit your options, the resources you may already have available and any assumptions that need testing.

Once it has enough information, it will tell you that you are ready to move on to Prompt 7.

PROMPT 6: RESOURCES AND CONSTRAINTS

Now help me ground the plan in reality.

Start by asking me to share whatever I already know about the resources and constraints affecting this plan. Make it clear that rough notes are fine and I can type or dictate my answer, or upload relevant budgets, plans, schedules, platform information or other files if my AI tool supports it.

Use what I provide, together with everything already established in this conversation and the priority gaps identified in Prompt 5.

Where relevant, help me explore budget, timescale, internal L&D capacity, subject matter experts, trainers or coaches, existing learning content or programmes, learning platforms or technology, learner and support time, operational constraints, geography, language, accessibility and anything else that could materially affect what is realistic.

Help me identify the constraints that genuinely limit our options, resources we may be underusing, existing content that could be reused or adapted, where internal capability could help, where AI or technology could genuinely increase capacity, where using technology simply because it is cheaper could weaken the solution, and any unrealistic assumptions about manager or learner time.

Do not ask about every area automatically. Only ask where the answer would materially improve the plan.

Continue asking concise clarification and follow-up questions until you have enough information. Then complete the stage using the short summary format agreed in the Master Prompt.

# Prompt 7 – External Perspective

**What are we working out?**

What is happening outside our organisation that should genuinely influence our plan?

**What happens next?**

Copy and paste the prompt below into the same AI conversation.

The AI will start by asking for any context that will make the research more relevant, such as your industry or sector, geography, organisation size or type, useful comparator organisations, and anything in particular you want to benchmark or explore.

You can type or dictate your answer, or upload relevant strategy documents, market information, research or other files if your AI tool supports it.

This prompt works best with an AI tool that can search the live web. If yours cannot, it should tell you clearly rather than presenting existing model knowledge as current research.

The AI will then look for current external evidence, examples and trends that could strengthen, challenge or change the thinking you've already done.

Once it has enough information, it will tell you that you are ready to move on to Prompt 8.

Prompt 7 begins on page 14.

## Prompt 7

PROMPT 7: EXTERNAL PERSPECTIVE

Before we decide on the learning strategy, help me look outside my organisation.

Start by asking me for any context that would help you make the research relevant, such as our industry or sector, geography, organisation size or type, useful comparator organisations and anything in particular I want to benchmark or explore. Make it clear that rough notes are fine and I can type or dictate my answer, or upload relevant files if my AI tool supports it.

Use what I provide, together with everything already established about our business priorities, audiences, current performance, capability gaps, resources and constraints.

Research current external evidence, ideas and examples that could genuinely improve our L&D decisions.

If you can search the live web, use current web research for this stage. Prioritise recent and credible sources such as original research, professional bodies, universities, government or regulators, credible company research with visible methodology and high-quality specialist publications.

Provide sources for specific statistics, benchmarks and factual claims. If you cannot search the live web, tell me clearly before continuing. Do not present existing model knowledge, older information or uncertain information as current research.

Explore where relevant what comparable organisations are prioritising in L&D, how organisations are responding to similar capability challenges, changes in in-person, virtual, digital and blended learning, how AI is being used within learning and development, approaches to learning measurement and evaluation, credible L&D investment or budget benchmarks, new practices gaining attention and approaches that appear to be falling out of favour.

Distinguish clearly between:

EVIDENCE: Research or data that supports a conclusion.

EXAMPLES: What particular organisations appear to be doing.

TRENDS: Patterns appearing across multiple credible sources.

HYPE OR UNCERTAINTY: Ideas receiving attention without enough evidence to show that they work.

Do not assume something is effective simply because other organisations are doing it. Do not recommend copying another organisation without considering whether their context is relevant to ours.

For this stage, use the WHAT THIS CHANGES format below instead of the standard stage summary.

When you have enough information, finish with:

WHAT THIS CHANGES

Give me only the external insights that should genuinely influence our L&D plan. For each one, explain briefly what we learned, why it matters to us and whether it changes, strengthens or challenges anything we have already concluded.

Keep this concise. Then finish with: “Stage complete. You can now paste the next prompt.”

# Prompt 8 – Learning Strategy

**What are we working out?**

What should the learning response actually look like?

**What happens next?**

Copy and paste the prompt below into the same AI conversation.

The AI will start by asking whether there is anything else that might affect the design, such as delivery preferences or restrictions, approaches that have worked or failed before, stakeholder expectations, cultural considerations or technology requirements.

You can type or dictate your answer, or upload relevant learning materials, previous programme information, feedback or other files if your AI tool supports it.

If you've got nothing else to add, that's fine. Most of the important context should already be in the conversation.

The AI will then use everything established so far to decide what people actually need to understand, practise, experience, apply or change before recommending the most appropriate learning approach.

Once it has enough information, it will tell you that you are ready to move on to Prompt 9.

PROMPT 8: LEARNING STRATEGY

Now help me decide what the learning response should actually be.

Start by asking whether I have any additional information that might affect the design, such as delivery preferences or restrictions, approaches that have worked or failed before, stakeholder expectations, cultural considerations, technology requirements or anything else that might shape the solution. Make it clear that I can simply say I have nothing additional, type or dictate rough notes, or upload relevant files if my AI tool supports it.

Use what I provide, together with everything established about business priorities, required behaviours, audiences, current performance, capability gaps, non-learning barriers, resources, constraints and relevant external evidence from the previous stage.

Do not recommend an approach simply because it is popular or because other organisations are using it. Do not begin by choosing formats. Begin with what people need to understand, practise, experience, apply or change.

Then consider the most appropriate combination of approaches. These might include facilitated workshops, virtual sessions, coaching, manager-led development, peer learning, on-demand resources, practice or simulations, workplace assignments, performance support, learning videos, AI-assisted practice or support, reflection, feedback and reinforcement or nudges.

Only recommend something where it solves a genuine part of the problem.

Think about what needs to happen before, during and after formal learning so people have a realistic chance of changing behaviour at work. Also identify any important actions that sit outside L&D.

Do not ask about every possible design consideration automatically. Only ask where the answer would materially improve the strategy.

Continue asking concise clarification and follow-up questions until you have enough information. Then complete the stage using the short summary format agreed in the Master Prompt.

In the CARRY FORWARD section, include the core recommended learning approach so we can use it later when building the full plan.

# Prompt 9 – Implementation

**What are we working out?**

How could this realistically happen?

**What happens next?**

Copy and paste the prompt below into the same AI conversation.

The AI will start by asking what you already know about how the learning strategy might need to be implemented. This might include deadlines, ownership, approval processes, procurement, technology, delivery capacity, learner availability, manager involvement, pilots, localisation or other important dependencies.

You can type or dictate your answer, or upload relevant project plans, timelines, schedules, procurement information or other files if your AI tool supports it.

You don't need a detailed implementation plan at this stage. The AI will help you work out the main phases, sequencing, ownership, dependencies and risks needed to make the overall L&D plan credible.

Once it has enough information, it will tell you that you are ready to move on to Prompt 10.

PROMPT 9: IMPLEMENTATION

Help me turn the proposed learning strategy into something that could realistically happen.

Start by asking me to share anything I already know about how this might need to be implemented. Make it clear that rough notes are fine and I can type or dictate my answer, or upload relevant project plans, timelines, procurement information or other files if my AI tool supports it.

Use what I provide, together with everything we have already discussed.

Where relevant, help me explore deadlines or launch dates, programme ownership, approval processes, procurement, technology, delivery capacity, learner availability, manager involvement, pilots, localisation and important dependencies.

Help me think realistically about the main phases, sequencing, ownership, dependencies, important decisions, implementation risks, what must happen before launch, early delivery, wider rollout, reinforcement and embedding, and evaluation.

Before recommending a sequence of activity, help me prioritise what will make the greatest difference to the organisation. Consider business importance, urgency, strength of evidence, feasibility, cost and dependencies. Distinguish between quick wins, longer-term priorities and initiatives that should be deferred or reconsidered.

Make the trade-offs explicit rather than trying to accommodate everything. Challenge me if I am treating all priorities as equally important or proposing more than our resources can realistically support.

Include relevant non-learning actions that might address problems more quickly or remove barriers to performance. Where addressing these first could reduce the need for training or release resources for higher-priority development, explain why. Do not assume every proposed initiative belongs in the plan.

Do not create a detailed project plan yet. We only need enough implementation thinking to build a credible, prioritised L&D plan later.

Do not ask about every area automatically. Only ask where the answer would materially improve the plan.

Continue asking concise clarification and follow-up questions until you have enough information. Then complete the stage using the short summary format agreed in the Master Prompt.

Prompt 10

# Prompt 10 – Stakeholder Alignment

**What are we working out?**

Who needs to support this plan, and where could resistance or lack of involvement cause problems?

**What happens next?**

Copy and paste the prompt below into the same AI conversation.

The AI will start by asking which stakeholders, roles or groups you already know are relevant. This might include senior sponsors, budget holders, HR or People leaders, operational leaders, line managers, subject matter experts, participants, influential supporters or likely sceptics.

You can type or dictate your answer, or upload relevant stakeholder maps, organisational charts, project documents or other files if your AI tool supports it.

The AI will help you identify any important stakeholders you may have missed, what the people who matter most are likely to care about, what you need from them and where objections or resistance could affect the plan.

It will distinguish between what you know about a stakeholder and what still needs to be tested rather than inventing opinions.

Once it has enough information, it will tell you that you are ready to move on to Prompt 11.

PROMPT 10: STAKEHOLDER ALIGNMENT

Help me identify the people whose support could strengthen or undermine this plan.

Start by asking me to share any stakeholders, roles or groups I already know are relevant. Make it clear that rough notes are fine and I can type or dictate my answer, or upload relevant stakeholder maps, organisational charts, project documents or other files if my AI tool supports it.

Use what I provide, together with everything already established in this conversation.

Where relevant, help me consider senior sponsors, budget holders, HR or People leaders, operational leaders, line managers, subject matter experts, participants, influential supporters and likely sceptics.

If important stakeholders appear to be missing, help me identify them.

For the people who matter most, help me understand what they are likely to care about, how much influence they have, what we need from them, what they may object to, what evidence or argument may matter to them and how we should keep them involved.

Do not invent stakeholder opinions. Where I have told you what a stakeholder thinks, treat that as known context. Where you are inferring what they may care about or object to, label it as something to test.

Do not ask about every stakeholder automatically. Focus on the people whose involvement could materially affect the plan.

Continue asking concise clarification and follow-up questions until you have enough information. Then complete the stage using the short summary format agreed in the Master Prompt.

# Prompt 11 – Measurement

**What are we working out?**

How will we know whether anything meaningful changed?

**What happens next?**

Copy and paste the prompt below into the same AI conversation.

The AI will start by asking what data, measures or evaluation information you already have. This might include performance data, business metrics, employee or customer surveys, manager observations, reporting processes, existing baselines, review cycles or measures senior leaders already care about.

You can type or dictate your answer, or upload relevant reports, dashboards, survey results, performance data or other files if your AI tool supports it. The AI will help you identify the smallest useful set of measures, distinguish learning activity from behaviour and business outcomes, and work out what you can and cannot reasonably claim about impact.

If important baselines or measures are missing, it will help you identify what information would strengthen the evaluation approach rather than inventing figures.

Once it has enough information, it will tell you that you are ready to move on to Prompt 12.

PROMPT 11: MEASUREMENT AND EVALUATION

Help me decide how we will know whether this plan is working.

Start by asking me to share whatever data, measures or evaluation information I already have. Make it clear that rough notes are fine and I can type or dictate my answer, or upload relevant reports, dashboards, survey results, performance data or other files if my AI tool supports it.

Use what I provide, together with the business outcomes, required behaviours, baseline and learning strategy already established.

Where relevant, help me explore available performance data, existing business metrics, employee or customer surveys, manager observations, reporting processes, current baselines, review cycles and measures senior leaders already care about.

Help me distinguish between whether people valued the learning, whether they learned something, whether behaviour changed and whether relevant business measures changed.

Do not imply that L&D caused a business result unless the evidence could genuinely support that conclusion. Do not rely on attendance, completion or satisfaction simply because they are easy to measure.

Focus on the smallest useful set of measures that would tell us whether meaningful progress is happening.

Also help me identify baselines we already have, baselines we still need, sensible review points, useful evidence of behaviour change, relevant business indicators, limitations in what we can reasonably claim and the potential cost or risk of doing nothing.

Do not invent financial figures. If we cannot responsibly estimate the cost of inaction, tell me what data I would need rather than creating a speculative figure.

Where the External Perspective stage identified credible external benchmarks or measurement practices, consider whether they would genuinely improve our approach. Do not use an external benchmark unless the comparison is meaningful for our organisation.

Do not ask about every possible measure automatically. Only ask where the answer would materially improve the evaluation approach.

Continue asking concise clarification and follow-up questions until you have enough information. Then complete the stage using the short summary format agreed in the Master Prompt.

Prompt 12

# Prompt 12 – Complete Plan

**What are we working out?**

How do we turn everything we have established into a complete L&D plan that works for the people who need to read, approve or act on it?

**What happens next?**

Copy and paste the prompt below into the same AI conversation. Please note that this prompt runs across two consecutive pages.

The AI will start by asking who the primary audience for the plan is and what you need them to understand, decide, approve or do after seeing it.

You can type or dictate your answer, or upload relevant briefing documents, stakeholder information or other files if your AI tool supports it.

The AI will then review the full conversation and use everything established across the previous stages to create a detailed L&D plan.

It will tailor the emphasis, language, level of detail, evidence and risks to the audience you identified without changing the underlying facts or recommendations.

The final output will include the complete plan, an audience-specific executive version and a health check highlighting the areas that still need strengthening or validating.

Prompt 12 begins on page 20.

## Prompt 12

Note this prompt runs across two consecutive pages.

PROMPT 12: CREATE MY COMPLETE L&D PLAN

Before creating the plan, ask me:

1. Who is the primary audience for this plan?
2. What do I need them to understand, decide, approve or do after seeing it?

Make it clear that I can type or dictate my answers, or upload relevant briefing documents or other files if my AI tool supports it.

Ask any concise clarification questions you need to understand the audience and the decision I need from them. Once you understand that, continue.

Review this entire conversation from the beginning. Use everything established during the previous stages, including clarification questions, my answers, stage summaries, external research, assumptions and unresolved issues.

Use only information we have actually established. Do not invent facts, evidence, budgets, targets, stakeholder views or organisational context. Clearly label anything that remains an assumption, unresolved question, missing evidence or decision still to be made.

Where important evidence is missing, explain how this affects the strength of our recommendations. Make clear which decisions are supported by sufficient information and which should remain provisional until further evidence is available.

Now create a detailed strategic L&D plan suitable for discussion with the primary audience we identified.

Do not change the underlying facts or recommendations simply to make the plan more appealing to that audience. Instead, tailor the emphasis, order, language, level of detail, relevant risks, evidence they are likely to need and the decision or action being asked of them.

This output should contain enough detail to stand alone as a useful planning document. Prioritise clarity over length. Use tables where they genuinely improve usability, particularly for the implementation roadmap and measurement approach.

STRUCTURE THE PLAN AS FOLLOWS:

1. EXECUTIVE SUMMARY: Explain what the organisation is trying to achieve, the people or performance challenge, the most important capability priorities and the recommended response.

2. BUSINESS PRIORITIES AND REQUIRED BEHAVIOURS: Show the key business priorities, why they matter, what people need to do differently and how those behaviours connect to the priorities.

3. PRIORITY AUDIENCES: Explain who the plan is for, where needs are shared, where they meaningfully differ and which groups should be prioritised.

4. CURRENT STATE: Summarise existing strengths, current performance, available baseline evidence and weaknesses or limitations in the evidence.

5. PRIORITY GAPS: Show knowledge gaps, skill gaps, confidence or mindset issues, working environment barriers, future capability needs and which gaps have been prioritised and why. Clearly separate issues that appear to require L&D from those that may require another organisational response.

6. EXTERNAL PERSPECTIVE: Include only external evidence, trends, benchmarks or examples that materially influenced the recommendations. Make clear whether each important insight strengthened, changed or challenged our existing thinking. Do not turn this into a general research summary.

7. RECOMMENDED LEARNING STRATEGY: For each major element explain the need it addresses, what people need to do differently, the recommended learning method, why it fits, how people will practise, how learning connects to real work, the role of managers, the role of AI or technology where useful, and how learning should be reinforced or embedded. Include important non-learning actions that need to happen alongside the learning.

8. RESOURCES AND CONSTRAINTS: Summarise budget realities where known, time and capacity, existing resources, technology, manager and learner availability, operational constraints and important risks or compromises.

9. IMPLEMENTATION ROADMAP: Set out the main phases, key activities, likely ownership, dependencies, important decisions, major implementation risks and early indicators that implementation is on track.

## Prompt 12

Clearly distinguish immediate priorities, quick wins, longer-term initiatives and activities that should be deferred or reconsidered. Explain why the priorities have been sequenced this way and what trade-offs are involved. Include relevant non-learning actions, their likely owners and any dependencies that affect the sequence.

10. STAKEHOLDER STRATEGY: Explain who matters most, what we need from them, likely concerns where known, questions we still need to ask them and how they should be involved throughout the programme.

11. MEASUREMENT AND EVALUATION: Set out expected behaviour changes, available baselines, baselines still required, useful measures, review points, who should provide or review evidence, relevant business indicators and what we can and cannot reasonably claim about impact.

12. WHAT STILL NEEDS VALIDATING: List assumptions, missing evidence, unanswered questions, outstanding stakeholder conversations and decisions still required. Prioritise these by how much they could affect the plan.

For each significant evidence gap, explain what information is needed, why it matters and which recommendation might change when that information becomes available.

Clearly identify decisions that can proceed now and those that should remain provisional. Where a recommendation is based on limited evidence, explain what would need to be validated before significant resources are committed.

13. IMMEDIATE NEXT ACTIONS: Give me the most important actions to take next, in priority order.

Then create two additional outputs:

A. AUDIENCE-SPECIFIC EXECUTIVE VERSION

Create a concise version specifically for the primary audience I identified. Focus only on what they need to know to make the decision or take the action I need from them.

Make the ask explicit. Then give me their likely questions, potential objections or concerns, evidence I should have ready and the decision or support I need from them.

B. PLAN HEALTH CHECK

Score the plan from 1 to 5 for business alignment, quality of diagnosis, future readiness, audience relevance, learning design, feasibility, stakeholder alignment and measurement clarity.

Explain every score below 4. Then identify the three weakest areas and tell me exactly what information, evidence, conversation or decision would strengthen each one.

Where missing evidence materially affects the credibility of a recommendation, make this clear in the score and explain how obtaining that evidence could change the plan.

Bonus

# Bonus – Challenge

You could stop there.

Or you could find out what happens when someone who was not involved in building the plan starts asking awkward questions.

Which, sooner or later, somebody probably will.

BONUS: TRY TO BREAK MY PLAN

I now have a completed L&D plan.

Review it as three people: 1. a sceptical CFO, 2. a senior operational leader, 3. an experienced L&D Director.

Review the actual plan we created, not generic L&D practice. Each person should identify the 2 or 3 questions or concerns they would be most likely to raise.

Look particularly for claims I may struggle to defend, assumptions being treated as facts, unclear links to business performance, learning activity that may not solve the underlying problem, unnecessary or expensive activity, unrealistic implementation assumptions, weak stakeholder support, weak measures, missing evidence and important risks.

Also consider the primary audience we identified. Identify anything that could weaken the case with them or prevent them making the decision or taking the action I need.

Keep each reviewer's challenge concise. Do not criticise something simply for the sake of it. Focus only on issues that could genuinely affect whether the plan receives support or succeeds.

Then finish with:

THE FIVE THINGS I WOULD FIX BEFORE PRESENTING THIS PLAN

Give me the five highest-priority improvements, briefly explain why each matters and tell me what I should do next.

Bonus

# Bonus – Review My Existing L&D Plan

Already got an L&D plan?

Before you put it in front of anyone, it might be worth finding out how well it stands up to scrutiny.

This prompt lets you upload or paste an existing plan, even if you haven't used the previous 12 prompts. The AI will question your assumptions, identify potential weaknesses and help you work out what needs strengthening.

Better to find the gaps now than when someone is asking you to justify the budget.

BONUS: REVIEW MY EXISTING L&D PLAN

I already have an L&D plan and want you to act as an experienced, commercially minded Learning & Development consultant to review and challenge it.

Start by asking me to share my plan. Explain that I can paste the content or upload a document if my AI tool supports it.

Then ask for any important missing context, including business priorities, audiences, performance challenges, available evidence, budget, resources, implementation constraints and intended stakeholders.

Ask no more than 1 to 3 focused questions at a time. Don't simply accept vague answers or unsupported assumptions. Challenge my thinking where further information could materially improve the review.

Once you have enough context, critically assess:

1. Alignment with business priorities and required behaviour changes.
2. Evidence supporting the identified performance and capability gaps.
3. Whether the proposed learning interventions address the underlying problems, including where non-learning actions may be more appropriate.
4. Budget, resources, practical constraints and implementation feasibility.
5. Strategic prioritisation, sequencing, quick wins and longer-term needs.
6. Stakeholder involvement and likely objections.
7. Measurement, evaluation and evidence of impact.

Distinguish between genuine weaknesses, missing information and assumptions requiring validation. Don't invent organisational facts, figures or evidence, or criticise something simply because it hasn't been explained.

Then produce:

PLAN HEALTH CHECK: Score the plan from 1 to 5 across business alignment, diagnosis, prioritisation, learning design, feasibility, stakeholder alignment and measurement. Explain the most important weaknesses.

STAKEHOLDER CHALLENGE: Identify the key questions a sceptical CFO, senior operational leader and experienced L&D Director might raise.

FIVE PRIORITY IMPROVEMENTS: Explain the five changes that would most strengthen the plan and what I should do next.

WHAT STILL NEEDS EVIDENCE: Identify missing information that could materially change the recommendations, why it matters and where I might find it.

Focus on making the plan stronger, not simply finding fault. Don't rewrite the entire plan unless I ask you to.

Bonus

# Bonus – Convert My Plan

Built a new L&D plan? Strengthened one you already had?

Either way, there's still the small matter of getting other people on board.

This prompt helps you turn your L&D plan into a PowerPoint presentation or executive summary, tailored to the people who'll be reviewing it and the decisions you need them to make.

Because even a good plan needs to make a convincing case.

BONUS: CONVERT MY L&D PLAN

I have a completed L&D plan and want you to help me turn it into a professional, audience-specific document that I can use to present my recommendations and secure the decisions or support I need.

Use the completed plan and everything established in this conversation. If the plan isn't available, ask me to paste or upload it before continuing.

Start by asking whether I want:

1. A PowerPoint presentation for senior stakeholders.
2. A concise executive summary document suitable for sharing with decision-makers.

Then ask who the audience is, what I need them to understand, decide, approve or do, and any important requirements around length, format or presentation style.

Ask concise follow-up questions where necessary.

Create the requested output, drawing on the evidence, findings and recommendations in my existing plan.

Focus on:

- The business priorities and case for action.
- The key performance and capability challenges.
- The recommended learning strategy and why it fits.
- Strategic priorities, implementation and resources.
- Measurement, expected impact and relevant business indicators.
- Risks, uncertainties and assumptions still requiring validation.
- The decisions, investment or support required from the audience.

Tailor the emphasis and level of detail to the audience without changing the underlying facts or recommendations.

For a presentation, create a clear slide-by-slide narrative with meaningful slide titles, key messages and concise supporting content.

For an executive summary, create a well-structured standalone document with clear recommendations, supporting evidence and an explicit request for action.

Do not invent budgets, figures, evidence or results. Distinguish confirmed information from assumptions and outstanding decisions.

If your AI tool supports creating PowerPoint or Word files, produce the requested file. Otherwise, provide properly formatted content that's ready to transfer into the relevant application.

# What Next?

You've got a plan. Or, perhaps more accurately, a much better starting point for one.

Maybe you've worked through all 12 stages and relevant bonus prompts. Maybe you've put an existing plan under the microscope and found a few things worth improving.

Either way, you've used AI to question assumptions, explore gaps and think more carefully about what your organisation actually needs.

Now show it to a human... Ideally, several of them.

Take it back to the people who understand the business, the teams involved and the realities behind the assumptions you've made.

Ask what you've missed.

Ask what they disagree with.

Ask whether the behaviours you identified would actually make a difference.

If you've used external research, ask whether the evidence, comparisons and ideas really apply to your organisation.

Pay particular attention to anything the AI labelled uncertain, assumed or still to validate.

A convincing plan is useful. A plan that survives contact with the people who have to fund it, support it, experience it and make it work is considerably more useful.

# Want Another Pair Of Eyes On It?

Bring your completed plan to Excel Communications and talk it through with one of our learning consultants. We can challenge the diagnosis, explore the gaps, look at what is realistic and help you turn the plan into learning that can actually happen.

We're a global people development business that has been helping organisations develop confident managers, inspiring leaders, high-performing teams and capable individuals since 1985. We design and deliver tailored learning journeys, with support from the first conversations about what your people actually need through to delivery, evaluation and embedding.

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**Booking.com**

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**Karen Blanc - VP of Inclusion, Belonging and People**
kent

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