



Your Bright Spot in Learning Solutions

About MSG Consulting

MSG Consulting helps organizations simplify complex learning challenges through clear, creative, and results-driven instructional design. MSG specializes in developing scalable, learning solutions that align with business goals and engage every learner.

Core Capabilities

MSG Consulting brings together instructional systems design expertise, technical proficiency, and project management discipline to deliver efficient, learner-centered solutions. Our core capabilities reflect the specialized knowledge and tools that enable every engagement to meet mission, compliance, and performance objectives.

Capability
Instructional Systems Design (ISD) using ADDIE, SAM, and Agile methodologies
eLearning design and development in Articulate 360, Adobe Captivate, and Camtasia
Section 508 / WCAG 2.1 accessibility compliance and testing
Learning Management System (LMS) administration and SCORM publishing
Project management, scheduling, and stakeholder communication
Needs assessment, task analysis, and performance gap analysis
Evaluation strategy and metrics (Kirkpatrick, Bloom's Taxonomy, ROI analysis)
SharePoint-based knowledge management and workflow automation



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Core Services

MSG Consulting transforms complex training needs into engaging, measurable learning experiences. Our services are built upon proven capabilities, tailored to client goals, and executed with precision and care.

Service	Description
Custom eLearning Development	Interactive, accessible courses optimized for digital delivery
Instructor-Led and Virtual Training Design	Comprehensive facilitation materials, job aids, and learner guides
LMS Configuration and Administration	System setup, course uploads, reporting, and learner management
Accessibility Audits and Remediation	Ensuring digital content meets Section 508/WCAG compliance standards
Learning Program Evaluation	Measurement plans, data collection, and continuous improvement reporting
SharePoint and Microsoft 365 Solutions	Team site design, document libraries, and automated workflows
Consultative Project Management	Clear scope, milestones, and communication to deliver on time and on budget

Approach

MSG partners closely with your stakeholders and subject matter experts to identify and discuss the “problem statement”, clarify goals, understand learners, and co-create solutions that are practical, creative, and measurable. From discovery to delivery, you’ll have clear visibility into milestones, reviews, and outcomes.

Why Clients Choose MSG Consulting

MSG considers the following critical aspects of the learning requirement:

- Maps the learner journey first
- Prototypes early (even if it's just sticky notes or sketches)
- Tests with real users, not just subject matter experts who already know everything
- Simplifies complex content into engaging, learner-centered experiences.
- Focuses on measurable outcomes that support business objectives.
- Maintains flexible partnership model that adapts to your workflow and timelines.
- Earns trust through creative, results-driven design and clear communication.



CLIENT NAME HERE

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New Client Onboarding – Step-by-Step Checklist

1) Project Overview	
Project Title:	
Client / Department:	
Primary Contact Name & Role:	
Date of Initial Meeting:	
Project Deadline / Launch Date:	
2) Business Goals	
Identify the business need(s) or problem(s) will this training address	
How will success be measured?	
Are there compliance, policy, or performance mandates?	
3) Target Audience	
Who are the learners (roles, locations, experience levels)?	
How many learners are expected?	
What motivates them to take this training?	
What challenges or barriers might affect their learning?	



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4) Learning Objectives

What specific behaviors or skills should learners demonstrate after training?	
Are there existing KPIs or metrics tied to these objectives?	

5) Existing Materials/Resources

List any current training, SOPs, or documentation available. Where are these located?	
Are there approved graphics, templates, or branding assets to use?	
Is SME access available for content validation?	

6) Delivery Preferences

eLearning (Articulate / Rise)	
Instructor-Led (ILT)	
Virtual Instructor-Led (VILT)	
Blended / Hybrid	
Job Aid / Performance Support	
Preferred course length:	
LMS or platform for hosting:	
Required accessibility standards (e.g., Section 508):	



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MSG Consulting
Client Intake Questionnaire Template
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7) Timeline and Review Process

Milestone	Owner	Due Date	Notes
Kickoff Meeting			

8) Approvals

Client Approval Signature:	
Date:	



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New Client Onboarding – Step-by-Step Checklist

1) Kickoff & Access

- Schedule kickoff and confirm agenda & attendees
- Collect NDAs/MSAs and confirm data handling expectations
- Gather access: Software Dev tool(s), SharePoint/OneDrive, LMS, systems to capture, brand assets
- Confirm primary contact, escalation path, and meeting cadence

2) Scope & Success

- Clarify business goal(s), success criteria, and Key Performance Indicators (KPIs)
- Confirm target audience, constraints, and timeline drivers
- Agree on deliverables and acceptance criteria
- Document risks/assumptions and mitigation owners

3) Content & SMEs

- Request source materials (SOPs, policies, prior training)
- Map SMEs to topics; lock weekly review cadence
- Identify systems/processes that require screen capture

4) Design & Development

- Draft high-level outline and learning objectives
- Select modality mix (eLearning/VILT/ILT/Microlearning)
- Create alpha prototype and review with stakeholders



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1) Kickoff & Access

- Plan beta content build and SME review schedule

5) QA, Accessibility & UAT

- Run QA checklist (functionality, content accuracy)
- Ensure accessibility (captions, transcripts, alt text, keyboard nav, contrast)
- Conduct pilot/UAT; collect feedback and fix issues

6) Launch & Change Management

- Prepare communications (launch email, FAQs, job aids)
- Coordinate LMS configuration (metadata, reporting)
- Confirm support plan and feedback channel

7) Analytics & Sustainment

- Define metrics (completion, score, behavior) and reporting cadence
- Plan maintenance triggers (policy changes, analytics insights)

8) Commercial & Closeout

- Confirm invoicing schedule and PO (if required)
- Deliver final files and documentation to client repository
- Conduct retro and capture lessons learned



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Project Context

Element	Description/Comments
Engagement / Project Name	
Client / Department	
Sponsor / PM	
Date	

Business Problem & Drivers

Problem	Description/Comments
Describe the current performance issue or opportunity:	
Are there learning gaps? (i.e., learners get stuck at the same place in the process).	
Are there compliance issues?	
What should learners be doing differently?	
What evidence supports the need for training? (e.g., errors, incomplete records, duplicate records, etc.).	



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Root Cause Analysis

Issue	Description
Identify whether the performance gap is due to:	
<i>Knowledge</i>	
<i>Skill</i>	
<i>Motivation</i>	
<i>Environment / Process</i>	
Describe any contributing factors	

Audience & Environment

Element to Consider	Details	Comments
Primary Learner Roles		
Locations / Time Zones		
Work Environment	Desk / Field / Hybrid	
Prerequisite Knowledge		
Accessibility Needs	Captions, transcripts, keyboard navigation, color contrast	



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Performance Objectives (On-the-Job)

Big Picture - What should learners be able to do after consuming the digital course and/or virtual training? (This may vary by role/module).

Role	Observable Behavior/Condition

Learning Objectives (SMART)

Help Us Understand	Description
How will success be measured for each of the performance objectives?	
Draft 3–5 specific, measurable learning objectives aligned to the performance objectives.	
Describe post-training/learning evaluation plans	

Constraints & Assumptions

Constraint	Description
Time / Schedule Constraints	
SME Availability	
Tooling / Licenses	
Policy / Security Constraints	



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Modality Selection Matrix

Modality	Use When	Pros	Cons	Notes
eLearning (SCORM/xAPI)	Self-paced skills, broad audience	Scalable, consistent	Less social, self-motivation	
VILT / Webinar	Distributed teams, discussion	Interactive, flexible	Schedule-bound	
ILT (Classroom)	Hands-on practice, role-play	High engagement	Logistics, cost	
Microlearning	Reinforcement, just-in-time	Bite-sized, mobile	Fragmentation risk	
Job Aids / KB	Reference tasks	Immediate, low cost	No skill transfer alone	

Tools & Licenses

Application	On hand or Purchase / How many?
Rapid eLearning tool(s) (e.g., Articulate, Captivate, etc.)	
File storage (e.g., SharePoint?)	
Software Licenses	



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Content Sources & SMEs

Content Type	Details
Existing Materials	Policies, SOPs, prior training
Systems to Capture	Screens/processes to record
Primary SMEs	Names / Roles / Contact

Assessment Strategy

Define knowledge checks, practice, and summative assessment. Identify criteria for success and remediation path.

Assessment Element(s)	Strategy/Comment

Accessibility & Inclusion

Plan for captions, transcripts, alt text, keyboard navigation, color contrast, and inclusive examples.

Accessibility Element(s)	Description/Comments



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Reporting & Success Metrics

What data will be collected (completion, scores, behavior change)? Map to Kirkpatrick levels where applicable.

Data/Element(s)	Description/Comments

Timeline & Milestones

Milestone	Estimated Delivery Date
Kickoff	
Design Review (Alpha)	
Content Review (Beta)	
Pilot/QA (Gold)	
Launch	

Stakeholders & RACI

List key roles and who is Responsible, Accountable, Consulted, Informed for each milestone.

Role	Responsible, Accountable, Consulted, Informed (R, A, C, I)



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Risks & Mitigation

Identify top risks (schedule, resourcing, technical) and proposed mitigations.

Risk	Mitigation

Sign-Off (Client)

Name	Title	Date

Sign -Off (MSG)

Name	Title	Date



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Stakeholder Analysis

MSG Consulting would like to learn about project stakeholders, their roles, communication strategies to ensure clear expectations and efficient collaboration throughout the project lifecycle.

1) Stakeholder Details

Name	Role/Title	Interest or Influence	Responsibilities	Preferred Communications
<i>Example: Jane Smith</i>	<i>Project Sponsor</i>	<i>High</i>	<i>Approves design and final deliverables</i>	<i>Email/Biweekly Meeting</i>

2) Engagement Plan

MSG communicates with key stakeholders according to their preferred strategy and frequency. We will coordinate key milestone check-ins, content review sessions, and project review sessions with a clear purpose and goal.



MSG Consulting
Development Tracking

MSG@MSGBrightspot.com | 240-422-7021

<https://www.msg-consulting.me>

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Double-click slide to view

A slide layout with a dark brown header bar containing the MSG Consulting logo in the top right corner. Below the header is a yellow bar with the text 'MSG Consulting'. The main content area features the title 'Project Kickoff' in a large, bold, dark brown font, followed by the subtitle 'MSG Consulting — *Your bright spot in learning solutions*' in a smaller, dark brown font.

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Project Kickoff

MSG Consulting — *Your bright spot in learning solutions*



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CONTENT DEVELOPMENT TRACKER (example image)

MSG Consulting — Content Development Tracker										
ID	Asset / Screen	Module	Type	SME	Developer/Writer	Review Round	Status	Link / Path	Due Date	Notes

PROJECT TRACKER (example image)

MSG Consulting — Project Tracker										
ID	Task / Deliverable	Owner	Status	Priority	Start Date	Due Date	Actual Date	% Complete	Dependencies	Notes



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