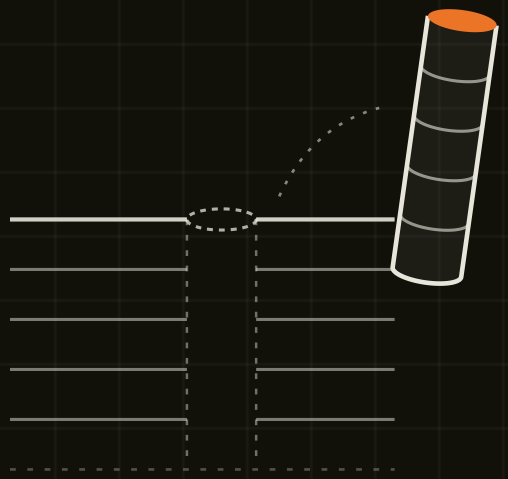
VIRGO DEVELOPMENT

FREE PLANNING WORKSHEET · 20-30 MINUTES

Learning Platform Planning Worksheet



Turn your curriculum, learning experience, and business requirements into a practical software development plan.

WHAT YOU'LL LEAVE WITH

01 Problem statement
02 One complete learner journey
03 User-role matrix
04 Content publishing workflow
05 Integration requirements
06 First-release scope
07 A one-page project brief

How to use this worksheet

01
Pick one real lesson you already teach well. Every exercise refers back to it.

02
Answer what you can in 20–30 minutes. Type in the fields, or print it and write by hand.

03
Finish with page 8: a one-page brief you can share with your team or bring to a development conversation.

You don't need all the answers.
This worksheet is designed to help you identify the important questions. "Not sure yet" is a useful answer.

ORGANIZATION

PREPARED BY

DATE

EXERCISE 1

Define the Opportunity

Start with the problem, not the software. A clear problem statement keeps every later decision honest.

Business or organization

Program or curriculum name

What problem are you trying to solve?
For your learners and for your business. What isn't working today?

> EXAMPLE Learners can watch our lessons, but they have few chances to practice and no way to know if they're improving. Families cancel when progress isn't visible.

Who is your primary learner?

- [ ] Children / early learning
- [ ] Students / enrichment programs
- [ ] Adult learning / professional training
- [ ] Other:

Ages, levels, or roles

Who pays?
Families, schools, employers, the learner?

What should the learning experience feel like?
What do learners do, not just watch? What would make them come back?

How will you know it's working?
Pick two or three measures: completion, practice time, renewals, school adoption, learner results.

Measure 1 | *Measure 2* | *Measure 3*

Problem statement
One or two sentences: who you serve, what they need, and what the platform will change.

OUTPUT **Problem statement and success measures**

EXERCISE 2

Map One Learning Experience

Trace one complete lesson from start to finish. Most of your real requirements show up here, before anyone writes a feature list.

The lesson you're tracing

Lesson name

Learning objective

After this lesson, the learner can...

01 Lesson

What does the learner watch, read, or hear first?

→

02 Practice

What does the learner actually do?

→

03 Feedback

How do they find out how they did?

04 Retry

What happens when they get it wrong?

→

05 Progress

What changes when they succeed?

→

06 Visibility

What does a parent, teacher, or admin see?

EXAMPLE **Lesson:** watch a short rhythm demo. **Practice:** play along, slower first. **Feedback:** “Nice! Try it a little faster.” **Retry:** attempts are saved. **Progress:** a reward, and the next lesson unlocks. **Visibility:** parents see attempts and growth.

Where does this happen?

- [ ] Computer
- [ ] Tablet
- [ ] Phone
- [ ] Classroom / shared device

What makes this lesson work when you teach it in person?

OUTPUT **One complete learner journey**

EXERCISE 3

Identify Users and Responsibilities

Permissions touch nearly every screen. Writing them down early is one of the cheapest ways to avoid rework later.

Who uses the platform?

In education, the learner, the payer, and the teacher are often three different people.

ROLE	WHO THEY ARE IN YOUR PROGRAM	WHAT THEY NEED TO SEE OR DO
Learner		
Parent / guardian		
Teacher / educator		
Curriculum creator		
Administrator		
Billing contact		
Other role		

> EXAMPLE **Parent / guardian:** pays for a family plan with two children; needs to see each child's progress and manage the subscription, but not edit lessons.

Permissions matrix

Check what each role is allowed to do. Gaps and question marks are worth discussing.

ROLE	TAKE LESSONS	VIEW OWN PROGRESS	VIEW OTHERS' PROGRESS	CREATE / EDIT CONTENT	PUBLISH CONTENT	MANAGE USERS	MANAGE BILLING
Learner	☐	☐	☐	☐	☐	☐	☐
Parent / guardian	☐	☐	☐	☐	☐	☐	☐
Teacher / educator	☐	☐	☐	☐	☐	☐	☐
Curriculum creator	☐	☐	☐	☐	☐	☐	☐
Administrator	☐	☐	☐	☐	☐	☐	☐
Billing contact	☐	☐	☐	☐	☐	☐	☐
Other role	☐	☐	☐	☐	☐	☐	☐

Any rules that are hard to explain?

For example: teachers see only their own class; a child can't change billing.

OUTPUT **User-role matrix**

EXERCISE 4

Plan Curriculum and Content Management

A learning platform is never finished, because the curriculum isn't. Plan how lessons get made and changed, not just how they're delivered.

Content inventory

What exists today, and where it lives. Rough amounts are fine.

CONTENT TYPE	FORMAT TODAY	ROUGHLY HOW MUCH?	HOW OFTEN DOES IT CHANGE?
Lessons / videos			
Practice activities			
Assessments / quizzes			
Printables / resources			
Audio / music			
Other			

Who will create new lessons and activities?

- [ ] Our curriculum team
- [ ] Outside authors or partners
- [ ] Not sure yet
- [ ] Teachers or instructors
- [ ] Developers (each change is a request)

Publishing workflow

Who is responsible at each step? Leave a step blank if it doesn't apply.

Draft	Review	Approve	Publish	Update
Who?	*Who?*	*Who?*	*Who?*	*Who?*

> EXAMPLE Curriculum managers draft activities in a lesson builder, the education director reviews, and lessons publish by level. Fixes go live without breaking progress for learners mid-lesson.

Who maintains content after launch?

What would make authoring easy for your team?

OUTPUT **Content inventory and publishing workflow**

EXERCISE 5

Define Business and Technical Requirements

A learning product is also a business. Billing, access, and the systems you already run affect the learner experience more than most plans expect.

Software you use today

SYSTEM	TOOL OR PRODUCT	WHAT IT DOES FOR YOU	KEEP / REPLACE / ?
LMS / course platform			☐ Keep ☐ Replace ☐ ?
Billing / subscriptions			☐ Keep ☐ Replace ☐ ?
CRM			☐ Keep ☐ Replace ☐ ?
Email marketing			☐ Keep ☐ Replace ☐ ?
Video hosting			☐ Keep ☐ Replace ☐ ?
Website			☐ Keep ☐ Replace ☐ ?
Other			☐ Keep ☐ Replace ☐ ?

How will people buy access?

Check all that might apply.

- ☐ Individual subscriptions
- ☐ Family accounts
- ☐ School or district licenses
- ☐ Free trial
- ☐ One-time purchase
- ☐ Pause instead of cancel
- ☐ Organization / employer seats
- ☐ Free tier
- ☐ Not decided yet

Access rules

What can a trial open? What happens when a plan changes or ends?

Reporting needs

What do you, schools, or parents need to report on?

Existing learners or subscribers to move?

☐ Yes ☐ No ☐ Not sure

If yes: roughly how many, and where does their data live?

> EXAMPLE Family subscriptions billed through a subscription platform, separate learner profiles per child, a 7-day trial, and current subscribers moved over without interruption at the same pricing.

OUTPUT **Integration and operational requirements**

EXERCISE 6

Prioritize the First Release

Your first release is the lesson you traced in Exercise 2, working end to end for real learners. Everything else waits until you've watched people use it.

Sort every capability you've written down into one of three columns

Must-have means the first release fails without it. Be strict: the column should describe one complete workflow, not a little of everything.

Must-have Needed for one complete workflow	**Later** Valuable, but can wait for real usage	**Needs validation** Test with learners before committing

EXAMPLE **Must-have:** one interactive lesson with practice, feedback, and basic progress; family accounts; subscription billing. **Later:** more game modes, advanced reports, a native app. **Needs validation:** leaderboards.

The first release must demonstrate...

One or two sentences. What will you learn by putting it in front of real learners?

Who will test it first?

e.g., 20 families from our current program

What would make you call it a success?

OUTPUT **Initial MVP scope**

YOUR PLANNING SUMMARY

Your Planning Summary and Next Steps

Bring it all together in a one-page brief you can share with your team or bring to a development conversation.

The project in one or two sentences

Primary learners

Who pays

The workflow we'll build first

Key roles

Systems to connect or replace

What success looks like after the first release

Our biggest unanswered questions

1.

2.

3.

The next decision we need to make

Where Virgo Development can help

Virgo Development is a U.S.-based software engineering team in St. George, Utah. We build custom learning platforms around the way you teach: practice and feedback, lesson authoring tools, family and school subscriptions, and progress views for parents and teachers. You own everything we build.

Bring this page to a free 30-minute Discovery Call.

You'll talk with engineers, not a sales team. We'll help you decide what to build, what to integrate, and how to approach your first release.

virgodev.com/pages/discovery

OUTPUT **Development conversation brief**