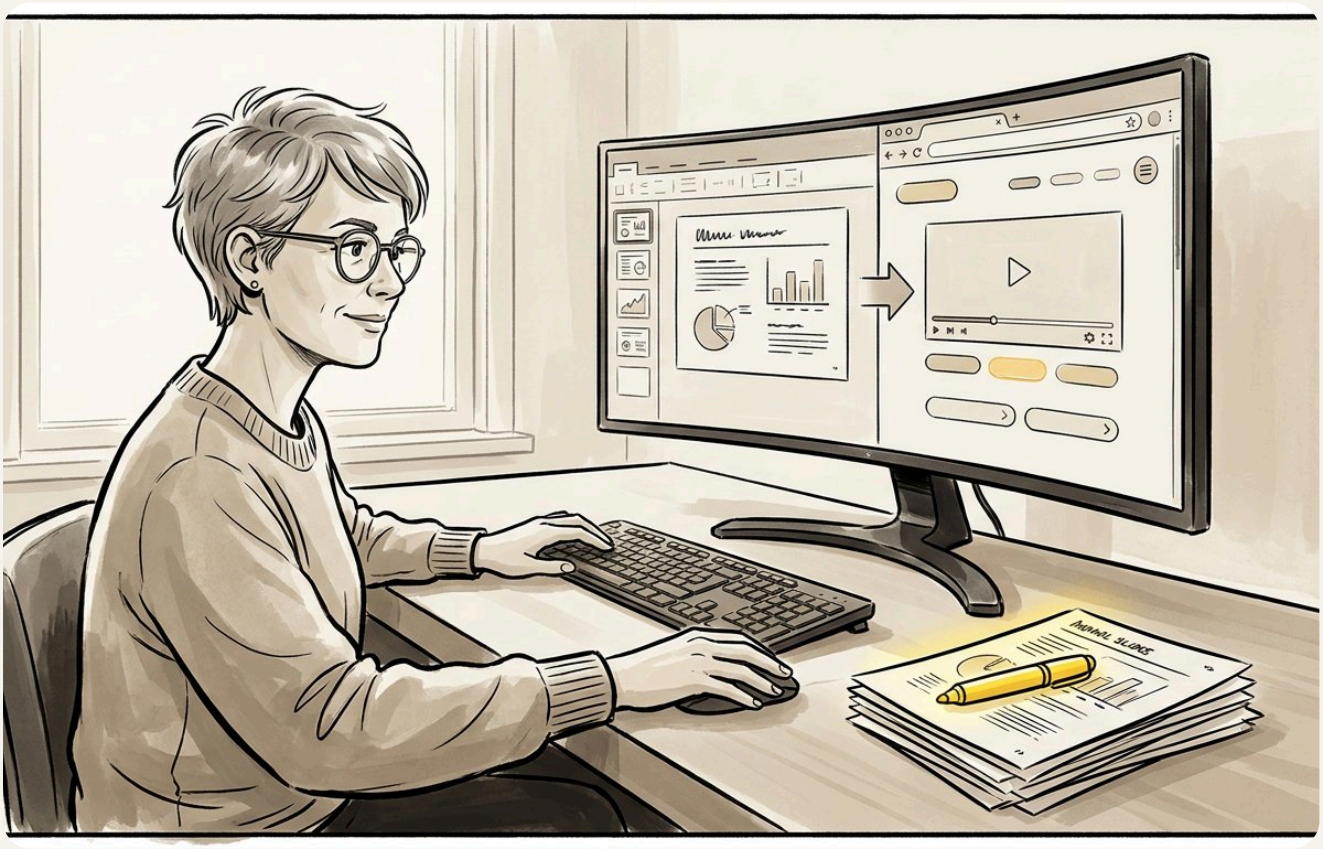
Build one course once and adapt it for each client

A playbook for training businesses, consultants and associations who deliver the same training to many client organisations. It covers the core course, the client layer, the platform set-up and a rollout checklist.



Build one core course that stays the same for every client, then adapt a small, planned layer for each one. You maintain one course, each client still sees their own name, rules and examples, and a fix to the core reaches everyone.

This playbook is for people like Raj, who trains his customers' staff on his product. Tom's association runs the same compliance course for many member organisations, so it suits him too. It also suits Fiona, a consultant who delivers one workshop to company after company and wants an online version.

Plan on a core of about 80% and a client layer of about 20%

Treat 80/20 as a planning rule of thumb. It's a starting split for scoping, and your own course may land at 70/30 or 90/10. The point is to decide the split before you build, so the client layer stays small and predictable.

The core course

The skills, steps, models and practice that are true for every client. You build it once, test it once and own it.

The client layer

Their logo and welcome, their policies and contacts, examples from their industry, their own scenarios or case, and their reporting.

What the client sees

A course that names their organisation, quotes their policy and shows situations their staff will recognise.

What you maintain

One core course plus a short list of swappable screens for each client, kept in a set place.

Sort every part of the course into core or client layer

Go through your current workshop or slide deck and put each part into one column. If a part changes for most clients, it belongs in the client layer.

Course part	Core or client layer	Example
The skill or process being taught	Core	The five steps for handling a customer complaint
Definitions and models	Core	What counts as a notifiable incident under the law
Practice activities and their logic	Core	Sort these six requests into the right priority
Assessment questions on the skill	Core	Which step comes after recording the complaint?
Logo, colours and welcome message	Client layer	A short welcome from the client's general manager

Course part	Core or client layer	Example
Policies, forms and who to call	Client layer	Their incident form and their safety officer's name
Industry examples	Client layer	An aged care example for one client, a retail example for another
Scenarios or a case study	Client layer	A story set in a site that looks like theirs
Questions on their own policy	Client layer	Under our policy, who approves a refund over a set amount?
Reporting and certificate details	Client layer	Monthly completion report sent to their HR team

A quick test for borderline parts

Ask whether the content would be wrong for another client. If it would be wrong, it goes in the client layer. If it would only feel less familiar, keep it in the core and add a client example beside it.

Design the course so the client layer is easy to swap

The client layer stays quick to update when it's kept apart from the core. Plan these habits into the first build.

- Put client content on its own screens or in its own lessons. Examples are a welcome lesson, a "Your organisation's policy" lesson and a "Who to contact" screen.
- Keep core screens free of client names, so they never need editing when a new client signs.
- Use placeholders like [CLIENT NAME], [POLICY NAME] and [CONTACT] in a master copy, then replace them per client.
- Write scenarios with a fixed structure (situation, choice, consequence) so you can change the setting without changing the logic.
- Keep images of people and places in the client layer, because they signal which industry the course is for.
- Collect every client detail through one intake form before the build starts.

A course map with the layer marked

Lesson	Layer	What changes per client
Welcome	Client layer	Logo, welcome message, why this matters to them
Lesson 1: the core skill	Core	Only one optional industry example screen

Lesson	Layer	What changes per client
Lesson 2: practice	Core plus one client scenario	The scenario setting and names
Your organisation's policy	Client layer	Policy summary, forms, contacts
Quiz	Core questions plus client questions	Three to five questions on their policy
Close and certificate	Client layer	Certificate wording, next steps, who to ask

Client intake form

Send this form to each new client before you start. It gives you everything for the client layer in one pass, so you aren't chasing details by email.

Organisation name and the name staff use day to day

Brand

Logo file, main colours, any style rules

Welcome message and who it comes from

Name, role and a short message, or approval for us to draft one

---

Contacts learners need

Who to call for help, for incidents, for course access

Policies and procedures the course should quote

Attach current versions and say who approves changes

Examples from your industry

Two or three common situations your staff face

Your own scenario or case

A real situation with names and details changed

Learner numbers and groups

How many, which sites or teams, any managers who need access

Reporting needs

Who gets reports, how often, which fields

Go-live date and launch contact

Set up the platform so each client has their own space

Your platform needs to keep each client's learners, content and reports apart. Learning platforms usually handle this with portals, groups or both.

- **Separate client portals or groups.** Each client gets their own space, branding where the plan allows, and only their own course version.
- **Cohorts.** Group learners by intake date or site, so you can track each round and send reminders to the right people.
- **Per-client reporting.** Give a manager at the client access to their own learners' progress and nobody else's.
- **Certificates.** Set a certificate template per client, with their name and the course title they use.
- **Enrolment.** Decide whether the client uploads a learner list, sends a sign-up link or connects their own system.

TalentLMS offers branches, which work as separate sub-portals with their own users, courses and look. LearnWorlds offers user groups with group managers and reporting by group. Features vary by plan, so check each platform's pricing page before you choose.

How DLD sets this up

Our complex school set-up ($3,000 ex GST) covers client portals or groups, cohorts, per-client reporting and certificates on LearnWorlds or TalentLMS. Platform fees are paid by you direct to the platform in US dollars. See school set-up and platforms.

Five AI workflows that save time on every client version

AI is useful for the client layer because the same task repeats for each client. In each workflow below, AI drafts and a person checks before anything reaches learners.

Workflow	What AI drafts	The human check that stays
1. The client welcome and examples	A welcome message and three industry examples from the intake form	The client approves the welcome. You confirm each example matches their work.
2. Scenarios adapted to an industry	Your core scenario rewritten in the client's setting, roles and terms	You check the choices and consequences still teach the same skill.
3. Quiz questions from their policy	Three to five questions with feedback, drawn from the policy they sent	The client's policy owner confirms every answer is correct.
4. A summary of client feedback	Themes from learner comments and survey answers	You read the raw comments before acting on any theme.
5. The client's launch emails	An announcement, a reminder and a last-call email in their voice	The client checks names, dates and links, then sends from their own address.

PROMPT 1

Adapt a core scenario to a new client's industry

Here is a training scenario from our core course: [PASTE SCENARIO]. Rewrite it for [CLIENT NAME], a [INDUSTRY] organisation. Use these roles and terms: [ROLES AND TERMS FROM INTAKE FORM]. Keep the same decision points and the same correct choice. Use plain Australian English and keep it under 150 words.

PROMPT 2

Draft quiz questions from a client policy

Here is [CLIENT NAME]'s policy on [TOPIC]: [PASTE POLICY]. Write [NUMBER] multiple-choice questions that test whether staff can apply it at work. Give four options each, mark the correct answer, and write one sentence of feedback that quotes the relevant policy clause.

Keep client material private

Check your AI tool's data settings before you paste in a client's policy or feedback. If the client has rules on AI use, follow them and record that you did. Read how we use AI.

Keep one master so a fix to the core reaches every client

Version control stops you fixing the same mistake ten times. Set up these habits from the first client.

1. Keep one master copy of the core course, and never edit core screens inside a client version.
2. Give the core a version number, such as Core 1.2, and record what changed in a short change log.
3. Name each client version after the client and the core version it uses, such as "Acme on Core 1.2".
4. When you fix the core, update the master first, then copy the changed screens into each client version.
5. Keep a list of which clients run which core version, and tell clients when an update goes live.
6. Store each client layer in its own folder, so a core update never overwrites client content.

Some platforms let several client groups share one course, which means a core fix appears for everyone at once. If each client needs its own copy, the change log and client list above keep the copies in step.

Price each client version as a set-up fee plus a licence

Price the core once in your own costs, then charge each client for their layer and their use. A common structure has two parts.

- **A set-up fee per client** covers the intake, the client layer, their portal or group, testing and launch.
- **A per-learner fee or an annual licence** covers ongoing access, hosting, reporting and support.

Work out your own figures from your costs and what your clients already pay for training. The lines below give you a worked example to fill in.

Your cost to build the client layer (hours × rate, plus any media)

Your share of platform fees for this client, converted from US dollars

---

Set-up fee you will charge this client

Per-learner fee × expected learners, or annual licence

Support time each year, first-year total and your margin

> **Agree the update terms up front**
>
> Write into each agreement what happens when the core changes and when the client's policy changes. State who pays for each kind of update and how quickly you will make it.

Rollout checklist for each new client

Before the build

- [ ] Agreement signed, including set-up fee, licence and update terms
- [ ] Intake form returned with logo, policies, contacts and examples
- [ ] Client approver named for content and for the policy questions
- [ ] Core version confirmed for this client

Build and check

- [ ] Client layer screens drafted from the intake form
- [ ] Scenario adapted with the decision points unchanged
- [ ] Policy questions written and approved by the client
- [ ] Every client screen checked by a person against the intake form
- [ ] Client review round completed and changes made

Platform and launch

- [ ] Client portal or group created, with branding where the plan allows
- [ ] Learners enrolled and placed in the right cohort
- [ ] Client manager given access to their own reports
- [ ] Certificate set up with the client's name and course title
- [ ] Test learner completed the course from start to certificate
- [ ] Launch emails approved and scheduled by the client

After go-live

- [ ] First report sent and checked with the client
- [ ] Learner feedback collected and summarised
- [ ] Client added to the version list for future core updates

Talk to us about a core course plus client versions

Send us your slides and tell us how many clients you train. We'll scope a core course, a client layer and a platform set-up with client portals or groups, all at fixed prices. Read about customer training, or call 1300 208 943.

Get a fixed-price quote

Discover Learning, discoverlearning.com.au, info@discoverlearning.com.au, 1300 208 943

A member of the Hungry Minds family. Bigger appetite? Hungry Minds designs and builds full programs. Learning to design? Instructional Design Australia.

General information only. Check platform prices and features on the vendor site before you buy.

© 2026 BRS Learning Pty Ltd. You may share this guide unchanged with credit to Discover Learning.