# **TRAINING PLAN TEMPLATE**

**1. INTRODUCTION**

**1.1 Goals of the Training Plan**

The objective of the [Training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) Plan is to define the strategies, tasks, and methods that will be used to meet the [training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) requirements. The goals of the [training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) plan are:

*\*\*\* Delineate specific goals that clearly communicate the scope of the*[*Training*](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604)*Plan. \*\*\**

**1.2 Overview of the Training Plan**

This document defines the [Training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) Plan for *\*\*\* System Name*\*\*\*. The [Training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) Plan is a working document. It is revised on a continuous basis as decisions are made and issues are resolved. The document is organized as follows:

· [Training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) Scope. Clearly states a list of the objectives and goals of the [training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604), as well as a list of assumptions.

· [Training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) Offerings. Describes the offerings that define the [training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604), including the [training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) groups, types of [training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604), [training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) approach, [training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) curricula, [training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604)schedule, and logistical information.

· Roles and Responsibilities. Presents the roles and responsibilities of the staff responsible for preparing, conducting, and evaluating the [training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604), and includes a clear definition of the resources and a work plan.

· Contingency Plan. Identifies anticipated contingencies and details a plan for each contingency.

· [Training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) Material Design, Standards, and Guidelines. A copy of the [Training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) Material Design, Standards, and Guidelines that will be used to prepare the [training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) materials.

**2. [TRAINING](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) SCOPE**

**2.1 Training Goals and Objectives**

The objectives of the [training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) are:

*\*\*\* List the objectives of the*[*training*](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604)*in point form. In stating the objectives, clearly indicate the scope of the*[*training*](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604)*. \*\*\**

To achieve these objectives, the following goals are established:

*\*\*\* List the goals that are set in order to achieve the outlined objectives. \*\*\**

**2.2 Assumptions**

The [training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) strategies, activities, and methods are predicated upon the following assumptions:

\*\*\* *Provide a list of assumptions in point form. \*\*\**

**3. TRAINING OFFERINGS**

The parameters for [training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) staff on the use of *\*\*\* System Name \*\*\** are specified. The following offerings are described:

· [Training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) Groups

· Types of [Training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604)

· [Training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) Approach

· [Training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) Curricula

· [Training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) Schedule

· Logistical Information

**3.1 [Training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) Groups**

This section describes the groups to be trained, including the title of the [training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604)group, types of staff, the type(s) of [training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604), and the number of staff.

*\*\*\* Provide a summary of this information in point form. Some information may be general in the early stages of the plan, (e.g., the types of*[*training*](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604)*may start out as a description and become a title as the types of*[*training*](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604)*are determined, and the number of staff may be an estimate until actual numbers are obtained. \*\*\**

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| Table 3-1 - Staff to be Trained |
| [Training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) Group Name: |
| Type(s) of [Training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604): |
|  | Types of Staff |
| Location | Name of Type | Name of Type | Name of Type | Name of Type | Total |
| Location # | # of staff |  |  |  |  |
| Location # | # of staff |  |  |  |  |
| Total |  |  |  |  |  |

**3.2 Types of**[**Training**](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604)

This section describes the types of [training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) to be delivered for each [training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) group, including the title of the [training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604), brief description of the [training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604), any prerequisites, and the length of the [training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604).

*\*\*\* Provide a table that lists the types of*[*training*](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604)*for each*[*training*](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604)*group. \*\*\**

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| Table 3-2 - Types of Training |
| [Training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) Group: |
| [Training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) Title | Prerequisites | Length | Description |
|  |  |  |  |
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**3.3 [Training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) Approach**

For each type of [training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604), this section describes how the [training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) will be delivered, including the methods to be used, the communication medium, techniques, tools, and aids.

*\*\*\* Provide a table or list in point form that delineates the approach for each type of*[*training*](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604)*for each*[*training*](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604)*group. \*\*\**

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| Table 3-3 - Training Approach |
| [Training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) Group: |
| [Training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) Title: |
| Method |  |
| Medium |  |
| Techniques |  |
| Tools |  |
| Aids |  |

**3.4 [Training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) Curricula**

This section describes the curriculum for each type of [training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604), including a list of topics, a description of each topic, [training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) objectives for each topic, the length of time allotted for the presentation of the topic, the delivery method and medium if there are various ones used within the course, and a preliminary agenda for each day of [training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604).

*\*\*\* Provide a table or list in point form. Some information may be general in the early stages of the plan, (e.g., the definition of the curriculum for each type of [training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604)begins with a list of the topics, which can then be reviewed and refined before the rest of the information is added). \*\*\**

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| Table 3-4 - Training Curriculum |
| Type of [Training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604): |
| # | Topic | Description | Objectives | Length | Method/Medium |
|  |  |  |  |  |  |
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**3.5 [Training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) Schedule**

For each type of [training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604), this section itemizes the parameters that affect the [training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604)schedule, describes how the schedule was derived, and details what the schedule is.

*\*\*\* Provide the*[*training*](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604)*parameters in table or point form, as well as a narrative description of how the schedule was derived, and a spreadsheet of the actual schedule for each type of*[*training*](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604)*. The schedule information becomes more specific as information is gathered. In the early stages, attendees are often identified as a total number. Eventually, a roster is added to identify the names of the students who are required to attend instructor-led*[*training*](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604)*or are required to complete a computer-based*[*training*](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604)*course. \*\*\**

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| Table 3-5 - Training Parameters |
| Item | Parameter |
| Type of Staff to be Trained |  |
| Type of [Training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) |  |
| Amount of Time Allotted |  |
| Number of [Training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) Sites |  |
| Number of Classrooms |  |
| Number of Trainees |  |
| Number of Trainers |  |
| Length of Each Session |  |
| Recommended Classroom Size |  |
| Amount of Equipment |  |
| Travel Time and Holidays |  |
| Special Circumstances |  |

**3.6 [Training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) Logistics**

This section identifies logistical information based on the requirements for the defined [training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) offerings. The logistical information includes a list of the equipment and supplies required.

*\*\*\* Provide a list of the equipment and a list of the supplies required to accommodate the types of*[*training*](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604)*defined in the previous processes. In early iterations of the document this section may not appear, because applicable requirements, such as the number of trainees per course, have not been established. In some situations, there may be appropriate equipment and supplies available, though not necessarily enough. For these circumstances, an inventory of the items can be provided with an indication that additional equipment and supply needs will be determined after the [training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604)offerings are further defined. \*\*\**

**4. ROLES AND RESPONSIBILITIES**

This section details the roles and responsibilities of the personnel responsible for preparing, conducting, and evaluating the [training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) for *\*\*\* System Name \*\*\*.*

**4.1 Resources**

This section describes the roles of those involved, the individuals who will fulfill the roles, and their area of responsibility*.*

*\*\*\* Provide an organizational chart of the*[*training*](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604)*team structure and any other pertinent organizations, such as the steering committee. Identify each type of [training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604)resource, including a description of their role and responsibilities, and list the staff members assigned to that role. \*\*\**

**4.2 Work Plan**

This section provides a chronological list of the activities and tasks that must be accomplished to prepare, conduct, and evaluate the [training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604). The work plan is an excerpt from the Project Management Plan and is included here for the purpose of identifying the tasks to be completed within the scope of the [Training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) Plan. If there is any discrepancy between the list contained here and the Project Management Plan, the Project Management Plan takes precedence. The work plan section shows the key person responsible for completing each activity and task, and the expected start and completion dates for each activity and task.

*\*\*\* Update the WBS Dictionary in the Project Management Plan to add more detailed tasks. Update the Responsibility Assignment Matrix (RAM) in the Project Management Plan to reflect the persons responsible. Add the task start and end dates for each of the WBS elements to the Project Schedule in the Project Management Plan. Include a copy of the applicable portions of the Project Management Plan in this section. \*\*\**

**5. CONTINGENCY PLAN**

This section outlines the procedure to be followed when handling emergencies. For each contingency the following information is provided:

· **Purpose**. Identifies the contingency, the conditions under which the contingency plan will be implemented, and the intended results of the implementation of the contingency plan.

· **Procedures**. Provides step by step instructions on how to implement the contingency plan.

**5.1 Contingencies**

*\*\*\* In a table or point form, identify each contingency (e.g., system failure, equipment failure, sick instructor), the conditions under which the contingency plan will be implemented, and the intended result of the contingency action. \*\*\**

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| Table 5-1 - Contingencies |
| Contingency | Condition for Action | Contingency Action | Intended Result |  |
|  |  |  |  |  |
|  |  |  |  |  |
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**5.2 Contingency Plan Procedures**

*\*\*\* For each contingency, prepare, in point form, detailed instructions for implementation of the contingency plan. \*\*\**

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| Table 5-2 - Contingency Procedures |
| Contingency: | Person Responsible: |  |
| Step Number | Procedure |  |
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**APPENDIX A - TRAINING MATERIAL DESIGN, STANDARDS, AND GUIDELINES**

The following is a copy of the design, standards, and guidelines that will be used during the preparation of the [training](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604) materials.

*\*\*\* Provide a copy of the design, standards, and guidelines that will be used to guide the*[*training*](http://it.toolbox.com/blogs/enterprise-solutions/training-plan-template-29604)*preparation process. \*\*\**

*\*\*\* Document the design parameters in one page, using a table format or list in point form. \*\*\**

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| Table A-1 - Training Materials Design Parameters |
| Approach |  |
| Medium |  |