**[Insert Department Name]**

**Training Plan**

**[Insert Project Name]**

Version History

| Version # | Date | Author | Key Differences |
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Introduction to the Training Plan Template

The Training Plan provides the foundation for the entire end user training program, including development, delivery, and evaluation of training for all end users of the system. As the project progresses toward implementation, much more time and effort is required for training, including the development of a Training Plan.

The Training Lead and training resources working with the OCM Practitioner typically develop the Training Plan with input from the Project Manager, Project Sponsor, project team, and any appropriate Stakeholders. Generally, one of the key objectives for projects is to balance training program needs without sacrificing project goals.

The Training Plan Template with Instructions provides guidelines for completing a Training Plan. Additional hints, examples, and suggestions are included within each of the template sections and/or tables where key information is recorded.

Template style conventions are as follows:

| Style | Convention |
| --- | --- |
| Normal text | Indicates placeholder text that can be used for any project. |
| [Instructional text in brackets] | Indicates text that is be replaced/edited/deleted by the user] |
| *Example text in italics* | *Indicates text that might be replaced/edited/deleted by the user* |

As you complete the template, please remember to delete all instructional text (including this section) and update the following items, as applicable:

* title page
* version history
* table of contents
* headers
* footers

Update the document to a minor version (e.g., 1.1, 1.2) when minimal changes are made and a major version (e.g., 2.0, 3.0) when significant changes are made.

# Introduction

The project Training Plan identifies the approach to managing end user training, training roles and responsibilities, and the training management process. This includes analyzing, planning, developing, delivering, and evaluating end user training. An effective end user training program serves to increase an individual’s knowledge, skills, or abilities relating to the new system.

The Training Plan is developed during the project’s Executing Process Phase; however, training requirements may exist as a result of Planning Process Phase activities. The intended audience of the Training Plan includes the OCM Practitioner, Project Manager, project team, Project Sponsor, and essential Stakeholders whose support is vital to carrying out the plan.

[In the Introduction of the Training Plan, provide a brief overview of the project and a high-level overview of the approach to end user training. Include the goals and objectives of the Training Strategy for the project and any special or specific Training needs known at this time. Effectively managing end user training is a key component of successful project management and can be used to facilitate the transfer of knowledge, skills, and abilities to the end users who will be interacting with the new system.]

# Methodology

[This subsection of the Training Plan describes the training method and approaches to be used for the proposed training program; these should relate to the size and scope of the training effort, intended audiences, perceived scope of the training effort, the training budget, and allocated resources.

Note: This section is typically completed during the Planning Process Phase.]

# Roles and Responsibilities

The table of Roles and Responsibilities below provides descriptions of duties for project roles in Training.

[Complete the Roles and Responsibilities table provided by determining the names, roles and responsibilities that are involved in Training for your project.]

*Example:*

| Name | Role | Responsibility |
| --- | --- | --- |
| [Name] | *Project Sponsor* | * *Provide advice in preparation strategies to be included in the Training Plan* * *Approve the Training Plan* * *Play a lead role in representing the project to external end users* |
| [Name] | *Project Manager* | * *Initiate effort to develop the Training Plan* * *Guide initial training needs analysis* * *Complete the Training Plan* * *Manage the schedule and activities related to the end user training program* |
| [Name] | *OCM Practitioner* | * *Undertake the training needs analysis process in consultation with the OCM Practitioner, project team and the sponsoring organization’s staff* * *Assist in developing the Training Plan* * *Review with the project team and the sponsoring organization’s staff* |
| [Name] | *Training Lead (if assigned)* | * *Undertake the training needs analysis process in consultation with the OCM Practitioner, project team and the sponsoring organization’s staff* * *Develop the Training Plan* * *Review with the project team and the sponsoring organization’s staff* * *Lead the effort to complete the approach identified in the Training Plan* |
| Various | *End Users* | * *Participate in the training* * *Provide feedback* |

# Training Processes

[Describe the Training approach, which includes the process for planning, developing, delivering, and evaluating end user Training. Define the Training Processes clearly enough to identify the necessary steps, activities, and responsibilities to manage the entire Training effort.]

## Plan for Training

The first step in developing a training program is to conduct a training needs assessment. This initial analysis, identifies the gaps between what roles and responsibilities Stakeholders currently have in comparison with the roles and responsibilities they will have in the future state. The differences, or gaps, between the two are defined as training needs to improve performance through the development of new knowledge, skills, and abilities. Properly conducted, the assessment of training needs identifies training program direction, builds participant commitment, generates management support and provides data for the evaluation of the process. Once training needs are established, the training approach, methods, and curriculum must be considered.

[In the Plan for Training section, describe the strategy for planning for Training, including assessing training needs, defining the approach for development, and determining training resources and logistics. Consider how the project will affected end users and what training elements will best meet their needs. Reference the CA-OCM Planning and Executing Chapters, Training Knowledge Area sections for additional information.]

### Assess Training Needs

[This subsection of the Training Plan describes the target audiences for courses to be developed. Target audiences may include employees and/or external stakeholders. Describe the tasks that must be taught to meet objectives successfully and the skills that must be learned to accomplish those tasks. A matrix may be used to provide this information. Also in this subsection, the training needs for each target audience are discussed.]

### Approach for Development

[This subsection of the Training Plan discusses the approach used to develop the course curriculum and to ensure quality-training products. This description includes the methodology used to analyze training needs in terms of performance objectives and to develop course objectives that ensure appropriate instruction for each target group. The topics or subjects on which the training must be conducted should be listed or identified.]

## Develop Training

The process for developing training identifies the approach used to develop the course curriculum and to ensure quality-training materials and products. It should include the methodology used to analyze training requirements in terms of performance objectives and to develop course objectives that ensure appropriate instruction for each target group. This is also the time when training content, resources, aids, equipment, and media are defined and developed.

[In the Develop Training section, describe the planned schedule, structure, and strategies for developing end user Training, including curriculum, objectives, content, and additional materials or resources needed to deliver the training effort. Reference the CA-OCM Executing chapter, Training Knowledge Area section for more information.]

### ****Training Curriculum Development****

[This subsection of the Training Plan provides descriptions of the components that make up each course. If a large number of courses or modules are described, place these descriptions in an appendix. Subsections of this section, if any, should be created for each course.

Each course may comprise one or more modules. A course description should be developed for each module. At a minimum, each course description should include the course/module title, required prerequisites, intended audience; course objectives, and intended duration.]

*Example:*

| **Course Title** | **Prerequisites** | **Audience** | **Objectives** | **Duration** |
| --- | --- | --- | --- | --- |
| [Enter the name of the course] | [List the prerequisites needed to take the course] | [Identify the intended audience] | [List the objectives of the course] | [Identify the intended length of training] |
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### Training Material Development

[This subsection of the Training Plan describes the process for training material development and defines the standards for training materials. This subsection defines: Document naming, versioning, and formatting conventions; Timelines for development and training material use; Intended audiences; and Storage locations for electronic and hard copy materials.]

### QA Process / Validation

[Managing the quality review process is key to the success of the end user training materials development effort. The quality review strategy outlines the “who, what, how and when” aspects of a quality review. This section will:

* Define the review lifecycle
* Detail what types of reviews are required
* Describe how the reviews will be managed

The success of the quality review process requires that all reviewers and developers have a clear understanding of the purpose, requirements, and scope of each review. The quality review process assures that:

* Training materials are appropriate for user group
* Training is specific to the function that the attendee performs
* Training materials are developed with consistent format and level of detail
* Review of the training material is done in a timely manner
* Review points are consistent
* Review is performed by the proper person]

## Deliver Training

Training delivery is a complex process that includes many activities, including the identifying, scheduling and assessment of training facilities, scheduling classes, registering end users, executing training readiness activities, communicating, and planning for contingency. Training delivery includes methodology, instructor qualifications, and the train-the-trainer approach.

[For the Deliver Training section, describe the planned schedule, structure, and strategies for enrolling participants and conducting training for all identified participants.]

### Define Training Resources and Logistics

[This subsection of the Training Plan describes the methods used to administer the training program, including procedures for class enrollment, student release, reporting of academic progress, course completion and certification, monitoring of the training program, training records management, and security, as required. It describes the resources required by both instructors and students for the training, including facilities; equipment, and materials. Information contained in this subsection can be generic in nature and can apply to all courses. This subsection of the Training Plan also presents a schedule for implementing the training program and indicating responsible parties. Include key tasks to be completed, such as when to set up training facilities and schedule participants; other activities essential to training; and dates on which those tasks and activities must be finished.]

### Instructor Preparation

[This subsection of the Training Plan defines the process for completing instructor preparation or the Train-the-Trainer program. It may consist of reviewing adult learning principles and facilitation skills, reviewing the course materials with the instructors, reviewing training logistics such as room set-up, and having the instructors attend the class as a co-facilitator before they are primary instructors.]

### Pilot Training

[This subsection of the Training Plan details the approach to pilot training. The train-the-trainer participants will pilot new course materials to a select population, often a User Acceptance Testing (UAT) audience and to the other instructors. The audience will evaluate the courses for usability. Specifically, they should consider the following questions for the pilot training:

* Do the terms and concepts make sense?
* Can participants complete the exercises as intended?
* Are the materials and exercises relevant to the session objectives?]

## Evaluate Training

[This subsection of the Training Plan details and outlines the approach to the pilot training. The ability to evaluate the effectiveness of the process and program to ensure that training and development objectives are met is critical to the success of the training program. This evaluation provides valuable insight to planning, developing, and delivering ongoing training, which includes refresh and new hire training opportunities.]

### Evaluate Training

[This subsection of the Training Plan describes the process of evaluating the effectiveness the training and development program. Training effectiveness is assessed on the development and retention of learned knowledge, skills, and abilities for all end user groups. As such, the training program should be evaluated in terms of meeting needs. This description should include methods used to test and evaluate training effectiveness, evaluate student progress and performance, and apply feedback to modify or enhance the course materials and structure.

One source of feedback could be a course- or module-specific Training Effectiveness Survey. This form should gather trainee reactions on the following topics: scope and relevance of course or module, appropriateness of objectives, usefulness of assignments and materials, effectiveness of course training materials, stronger and weaker features of the course, adequacy of the facilities, timing or length of the course or module, effectiveness of the instructor(s), and participant suggestions and comments.]

### Plan for Ongoing Training

[This subsection of the Training Plan describes the methods used to establish and maintain an ongoing training process. The ongoing training effort includes both refresh training, which addresses training gaps, and new hire training, which provides training opportunities to new employees. This description should include the processes for planning, developing, and delivering ongoing training.]