



<Project Name> Training Management Plan

Version X.XX

Instructions to the Author:

This is a template for developing a Training Management Plan.

The template includes instructions to the author, boilerplate text, and fields that should be replaced with the values and information specific to the project.

Blue italicized text enclosed in boxes provides instructions to the document author, or describes the intent, assumptions, and context of the annotated section. This instructional text should be removed from the final document to make the plan more readable. Text enclosed in angle brackets (<text>) indicates a field that should be replaced with information specific to a project. The author should set the style of the text inserted to replace the bracketed text appropriately.

Text and tables with content prefaced with e.g., are provided as examples of wording and/or formats that may be used or modified as required to support a specific project. The information and outline is a suggestion to assist in developing project documents; they are not mandatory formats. The author should tailor the content of the document to fit the project that this work product will support.

Purpose of the Training Management Plan:

The Project Training Management Plan serves to provide the training requirements for the project and describes how training will be conducted. The plan provides definition to the following components:

- What type of information will be communicated and the level of detail and format?
- What channels are involved in communications, e.g., meetings, email, telephone, web portal?
- The timing and frequency of information, both formal and informal
- Identification of the party responsible for the training, the flow of training, as well as how changes in process are managed
- The constraints, internal or external, which affect training
- The standard templates, formats, or documents used for training
- An escalation process for resolving any training-based conflicts or issues

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Revision History

Date	Version	Author(s)	Notes
1/8/2018	0.01		

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Introduction

Provide a general description of the training plan and a high-level overview of what the plan will include. Detail the purpose of the training and the goals the training is designed to accomplish. Include an executive summary.

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The purpose of the <PROJECT NAME> Training Management Plan is to detail how all project training requirements will be met by outlining the strategy, objectives, curriculum, and methodology to be used to deliver training, in support of, and as a deliverable for, the project. The Training Management Plan provides a roadmap of the activities required to support the development of training materials, coordination of training schedules, reservation of personnel and facilities, planning for training events, and other training-related tasks.

The key goals of this training plan are

- <GOAL 1>
- <GOAL 2>
- ...

Scope

Summarize the scope of the training plan. Reference both internal and external requirements sources as applicable.

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Assumptions

List all assumptions upon which this project training plan is predicated. Assumptions are statements believed to be true and from which a conclusion was drawn to define this plan.

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Various scenarios were considered to form the basis for this plan. Multiple assumptions were made. The applicability of the plan is predicated on...

Constraints

List any limitations that must be considered in the execution of this training plan. Constraints include any restrictions presented by stakeholder and/or end-user availability, blackout dates, or special needs. Types of constraints may include resource limits, schedule, or scope.

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Points of Contact

List the points of contact for training development, description of roles and responsibilities (can be added to an appendix), coordination, and facilitation. The points of contact may also include department or section managers and training schedulers as appropriate. Points of contact are necessary as a quick reference for the correct personnel to contact regarding questions about training, scheduling, or requirements.

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For any questions concerning training scheduling, development, coordination, or facilitation, please contact the appropriate point of contact. If in doubt of who to contact start with the lead training coordinator.

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Training Role	Point of Contact	Contact Email
e.g., Lead Training Coordinator	J. Smith, Director of Training	J.Smith@ct.gov
e.g., Training Schedule Consultant		
e.g., Facilities Coordinator		
e.g., Lead Facilitator		
e.g., Lead Instructor		

Requirements Traceability

List all project training requirements or objectives in the table below. Also list the success criteria for each. Success criteria must be SMART: Specific, Measurable, Attainable, Relevant, and/or Time-bound. Examples are listed in table below.

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#	Requirement/Objective	Success Criteria
1	e.g., develop Computer or Web Based Training (CBT or WBT) modules to train first line supervisors and end-users on how to generate reports	Reports CBT or WBT will be published and available 30 days prior to go-live on 2/18/2019
2	e.g., train all project core team trainers in the configuration of the solution	The core team trainers will be able to begin providing training to end-users by or before 12/31/2018
3		
4		
5		

Needs and Skills Analysis

Describe various aspects of the training to include the following: organizational needs, training development approach, target audience, learning objectives, and skills required to meet learning objectives. This section is important in establishing the foundation of the overall training plan. It provides a description of what the organization's needs are, how the training was developed, and the skills and learning objectives required to meet these needs.

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E.g., the project team has identified a gap in their knowledge of the configuration of the baseline implementation of the <PRODUCT NAME> solution. Additionally, project stakeholders are concerned with the ability of their end-users to quickly transition their department business processes in concert with the implementation of the new system. The project's training requirements mandate that all personnel who will use the solution will be trained prior to go-live. To meet these requirements the project team must

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be better positioned to help department trainers with the transition and the department trainers must be proficient in the use of the product to effectively train their team members.

Curriculum

Describe the curriculum model being used and the components that make up each course. If many courses or modules are described, place these descriptions in an appendix. Subsections of this section, if any, should be created for each course. Remove this instruction text from the final document.

Each course may be comprised of one or more modules. A course description should be developed for each module. At a minimum, each course description should include the course/module name; the length of time in hours the course/module will take; the expected class size (minimum, maximum, optimal); the target audience; actionable course objectives that tell the learner what they will be able to do after instruction; skill checks for key objectives; final evaluations at the end of the course to test proficiency; module content/syllabus; specific training resources required, such as devices, aids, equipment, materials, and media to be used; ensure compliance with Americans with Disabilities Act and Section 504 of the Rehabilitation Act; and any special prerequisites. The course description could also include information on instructor-to-student ratio, total number of students to be trained, estimated number of classes, location of classes, and testing methods.

e.g., [Project Training Team Configuration Training](#)

Duration: 5 work days (7-hour days with two 15-minute breaks and 1-hour lunch) or 27.5 hours

Audience: Project team instructors and business analysts

Prerequisites: Students must complete the product configuration tutorials prior to attendance

Resources Required: 20 seat training room w/ wall projector and HDMI cable

The learning objectives for this training are:

Learners will be able to

- Complete the tasks associated with the configuration and administration of the system
- Explain system configuration to department trainers and end-users
- Demonstrate the ability to help clients implement the solution

Syllabus: see Appendix A

e.g., [Department Trainer Training](#)

Audience:

Prerequisites:

Resources Required:

The learning objectives for this training are

- Utilize the system and describe how it integrates with department business processes
- Explain system features and function to end-users
- Demonstrate the tasks associated to helping end-users implement their specific business processes in the system

Syllabus: see Appendix A

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e.g., Computer-based Training

Audience:

Prerequisites:

Resources Required:

The learning objectives for this training are

- ...

Syllabus:

Schedule

Provide a milestone or task level schedule for delivery of all training events and activities. Indicate responsible parties by milestone or task. Include assumptions like training start and end times and breaks. Key training events include: 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. As details emerge, the training plan should be updated with revised schedules, tasks, and assignments. A schedule must balance staffing numbers to ensure there are adequate resources to provide services while staff is in training. Identify how make-up, remedial, and schedule adjustments will be handled.

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Methodology

Describe the training methods to be used for each proposed course of instruction; these methods should relate to the needs and skills identified in the Needs and Skills Analysis Section of this document and should consider such factors as actionable course objectives, the target audience for a course, media characteristics, training setting criteria, and costs. Training methods should include best practices for adult learning including a teaching, guided practice, and individual learner practice.

The materials for the chosen training approach, such as course outlines, audiovisual aids, instructor and student guides, student workbooks, examinations, and reference manuals should be listed or discussed in this section. Materials should be compliant with Americans with Disabilities Act and Section 504 of the Rehabilitation Act. Describe how materials can be modified to comply with accommodation requests like large print font or other alternative formats. Sample formats of materials can be included in an appendix, if desired. Describe how materials will consistently follow a standard instructional design through use of a style guide or other guidance.

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Administration

Describe the methods used to administer the training program, including procedures for class enrollment, attendee release, training cancellation, reporting of progress, course completion and certification, monitoring of the training program, training records management, accommodations procedures for learners, and security, as required.

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Security

If applicable, this section should briefly describe any required training security controls and the need for the protection of sensitive data. If training requires handling sensitive information, this section will describe the processes and procedures for ensuring the security of that information in terms of validating both physical and online access, securing facilities and storage.

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Resources & Facilities

Describe the resources required by both instructors and attendees for the training, including classroom, training and laboratory facilities; equipment such as an overhead projector, projection screen, flipchart, or visual aids panel with markers, computer and printer workstations, and materials such as memo pads and pencils, memory storage devices, viewgraphs, and slides. Information contained in this section can be generic in nature and can apply to all courses. Specific course information and special needs may be itemized here as well or, if many different courses are involved, in the Curriculum Section.

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Repository & References

The key project references define the different types of interactions that will be used to provide the training. Identify the audience, delivery method, estimated timeframes, and actionable objective goals. Explain the method that will be used to access training materials and notes. Training could consist of different audiences, delivery options, etc., which would be defined below separately. Training could also be done on an ad hoc basis. Provide a link to where training artifacts and work products will be archived.

Remove this instruction text from the final document.

Environment

Identify the system environments required to deliver each course. Detail how each will be used during training. As appropriate, describe any simulated production data or data sets required to complete key training scenarios or cases that have been developed for instructional purposes. Describe how many users can be in the environment. Identify how time is used in the environment or if it is dated. Identify the process for a daily check of the training environment and how status will be communicated. Explain how the training systems and databases will be developed. If this section is not applicable, indicate "Not applicable."

Remove this instruction text from the final document.

Testing & Evaluation

Describe the methods used to assure quality throughout the curriculum development and delivery process. 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. Describe how the testing and evaluation data will be reported.

Remove this instruction text from the final document.

Knowledge Transfer

Knowledge transfer seeks to organize, create, capture, or distribute knowledge and ensure its availability for future users. Describe the methods that will be used to transfer knowledge to DSS for maintenance of design, delivery, materials, training environment, and related training activities. This may include Train-the-Trainer or joint training delivery with the DSS training organization.

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Approvals

REQUIRED. Identify by name, title, and signature the individuals agreeing to authorize expenditure of organizational resources to accomplish the project activities. At a minimum, the Training Management Plan should be signed by the Project Manager, the Project Sponsor, and, if applicable, the Executive Sponsor.

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Role	Name & Title	Signature	Date