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Description automatically generated

Training Plan

[Insert Project/Program Name]

***Purpose of Training Plan***

*The training plan sets the standards for how and when training on the project/program takes place. Based upon understood stakeholder needs, the training plan identifies training objectives for the project/program, strategy for training and schedule for training initiatives. An effective training plan introduces consistency to training and assists in ensuring stakeholders receive the training they need when they need it. The training plan must give the different audiences what they want.*

*A training plan is a living document that is created while the project/program is in planning. It will be monitored (along with the stakeholder register and communication plan) and executed during project/program planning, execution, and closure.*

***Training Plan Participants and Approvers***

*One of the most important sources of input is the stakeholder register since it identifies stakeholder interests and impacts pertaining to the project/program. This should help you identify who needs to be trained. Input into the training plan may also come from other project documentation, feedback from the* [*sponsor*](https://uwaterloo.ca/vpaf-project-management-office/methodologies/roles-and-responsibilities/projectprogram-sponsor) *and/or* [*project owner*](https://uwaterloo.ca/vpaf-project-management-office/methodologies/roles-and-responsibilities/project-owner)*, or conversations with specific stakeholders about their training needs and preferences.*

*The author is the* [*Project Manager*](https://uwaterloo.ca/vpaf-project-management-office/methodologies/roles-and-responsibilities/project-manager)*,* [*Program Manager*](https://uwaterloo.ca/vpaf-project-management-office/methodologies/roles-and-responsibilities/program-manager)*, or the author may also be a subject matter expert who specializes in training or the subject of training. There should be agreement with the sponsor and project owner.*

***Instructions***

1. *Review project information by reading documentation (stakeholder register, charter, project management plan), and discuss with the sponsor, project owner, and stakeholders.*
2. *Create the training plan. The green italic text contains instructions for filling out the template and can be removed for the final version of the document.*
3. *Review with applicable stakeholders, project team, sponsor, and project owner for accuracy and completeness.*

***Next Steps***

*Execute the training plan and modify as required until project/program is closed.*

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# Overview

*This section should document general objectives of the project/program as well as the training landscape provided by the project.*

[Insert Overview]

# Training Objectives

*Provide a description of the training objectives for the project/program. Identification of the training objectives will help streamline the training plan and avoid unnecessary effort. As an example, some common key training objectives for a project/program may include educate potential system users, training potential trainers, inform users of impending changes, and provide an opportunity for constructive feedback.*

[Insert Communication Objectives]

# Steps in Creating Training Plan

*The training plan is a dynamic document, developed with would-be trainers and stakeholders in mind. It is likely that there will be a broad consultation process for the plan. This is where that process is documented. An example of common steps is below.*

1. *Identify audience*
2. *Perform training needs assessment for each identified group*
3. *Validate needs assessment*
4. *Development of training materials*
5. *Delivery of training*
6. *Post-training evaluation*

[Insert Steps]

# Scope of Training Plan

*The scope of the training plan will identify the projects and phases to which the plan pertains. It will also identify the extent to which stakeholders are being trained.*

[Insert Scope]

# Audiences of Training Plan

*Identify the stakeholder groups who will receive training.*

[Insert Audiences]

# Assumptions, Dependencies and Risks

*Identify the assumptions, dependencies, and risks. Separate sub-sections can be used for this.*

[Insert Audiences]

# Training Needs Assessment

*What is the gap between what the learners do now and what is needed for them to do. (This may include process as well as tools they use to do their jobs.)*

[Insert Training Needs Assessment]

# Training Methods

*Provide a discussion of the training materials to be used to train the selected training audiences. This can be presented in a chart or a graphic image. For example, the image below depicts the training materials on a project. The example below could be modified or removed if you wish to use their own format for this section.*

[Insert Types of Training Materials]

# Training Logistics

*This section could include a description of training facilities to be used, training environments (e.g.: production vs. sandbox), and the learning system(s) to be used for both training and course registration.*

[Insert Training Infrastructure]

# Training Budget

*This section could include any funds committed to facilitating the training.*

[Insert Training Budget]

# Training Schedule

*Describe the recommended approach to training for the project/program. This approach should ensure the training objectives identified above are addressed and consider any documented training needs. The chart below should be filled in and there is also room for a text explanation, if required.*

*An example row has been included in the chart which can be removed. For larger, more complex projects, a communications calendar may also be added after the chart or in the appendix to summarize the timing of various training initiatives.*

[Insert Schedule]

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Type of training | Source for material | Audience | Schedule | Training material |
| *Train the trainer sessions* | *Vendor* | *Faculty Representatives* | *Once on June 23* | *• Workshops*  *• Presentations*  *• Webinars*  *• Video tutorials*  *• Manuals  • Reference guides*  *• One-page “cheat” sheet*  *• FAQs* |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

# Training Roles and Responsibilities

*Describe the roles and responsibilities for the training program. Only key roles need to be identified. One individual may hold more than one role.*

*An example row has been included in the chart which can be removed.*

[Insert Roles and Responsibilities]

|  |  |  |
| --- | --- | --- |
| Role | Accountabilities | Skills/Considerations |
| *Training Leads* | *• Responsible for managing and completing the training program, including the overseeing of instructional materials and training delivery*  *• Develop the training plan* | *• Understanding of adult education best practices*  *• Understand the goals of the project* |
|  |  |  |
|  |  |  |
|  |  |  |

# Training Evaluation

*After training is conducted it should be assessed to determine its effectiveness. Use this section to describe how your training initiatives will be assessed for effectiveness.*

[Insert Training Assessment]

# Approvals

This report formally authorizes the [insert project name] project’s training plan. This approval represents acceptance of the plan.

Sponsor Authorization: [print name of sponsor, title here]

*\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# Revision History

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Change Made By | Date Change Made | Details of Change | Change Reviewed/ Approved by | Date change reviewed/ approved |
|  |  |  |  |  |
|  |  |  |  |  |