

# Training & Learning Planner

## **WHY USE THIS TOOL:**

Getting employees to learn and understand your new technology platform is the name of the game. Use this tool to map out your training basics.

## **HOW TO USE THIS TOOL:**

Allot 90 minutes. Gather project team members (and/or those most knowledgeable about the upcoming change) in person or via telephone. Collaborate to complete the document to the best of your knowledge or ability.

# Training: What's the plan?

<b>MODULES OR RELEASES</b>	<b>TRAINING COORDINATOR: Has one been named? Who? If not, list possible candidates...</b>	<b>TRAINING PLAN: Has it been completed? If not, when is it scheduled to be complete?</b>
<b>List Module or Release here (e.g., what's new)...</b>	Who will lead this training?	<b>Y/N?</b> When? By whom?
<b>List here...</b>	Who will lead this training?	<b>Y/N?</b> When? By whom?
<b>List here...</b>	Who will lead this training?	<b>Y/N?</b> When? By whom?
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# Training: Which audiences need it?

AUDIENCES:	MODULES / RELEASES: What will each audience need to be trained on?
<b>Affected Function or Department Leaders:</b>	List specific technology modules or releases that will require training for this audience...
<b>Affected Function or Department Employees:</b>	List specific technology modules or releases that will require training for this audience...
<b>Senior Leaders:</b>	List specific technology modules or releases that will require training for this audience...
<b>Managers:</b>	List specific technology modules or releases that will require training for this audience...
<b>Employees (Office):</b>	List specific technology modules or releases that will require training for this audience...
<b>Employees (Field):</b>	List specific technology modules or releases that will require training for this audience...
<b>Employees (Plant):</b>	List specific technology modules or releases that will require training for this audience...
<b>External Channel Partners:</b>	List specific technology modules or releases that will require training for this audience...
<b>External Vendors:</b>	List specific technology modules or releases that will require training for this audience...
<b>External Customers:</b>	List specific technology modules or releases that will require training for this audience...
<b>Other?</b>	List specific technology modules or releases that will require training for this audience...

# Training: Which method is best?

AUDIENCES:	METHOD: What method(s) are most effective for each Target Audience?
<b>Affected Function or Department Leaders:</b>	List most effective methods: Instructor-led? Webinars? In-person? Online courses? On-the-job? Other?
<b>Affected Function or Department Employees:</b>	List most effective methods: Instructor-led? Webinars? In-person? Online courses? On-the-job? Other?
<b>Senior Leaders:</b>	List most effective methods: Instructor-led? Webinars? In-person? Online courses? On-the-job? Other?
<b>Managers:</b>	List most effective methods: Instructor-led? Webinars? In-person? Online courses? On-the-job? Other?
<b>Employees (Office):</b>	List most effective methods: Instructor-led? Webinars? In-person? Online courses? On-the-job? Other?
<b>Employees (Field):</b>	List most effective methods: Instructor-led? Webinars? In-person? Online courses? On-the-job? Other?
<b>Employees (Plant):</b>	List most effective methods: Instructor-led? Webinars? In-person? Online courses? On-the-job? Other?
<b>External Channel Partners:</b>	List most effective methods: Instructor-led? Webinars? In-person? Online courses? On-the-job? Other?
<b>External Vendors:</b>	List most effective methods: Instructor-led? Webinars? In-person? Online courses? On-the-job? Other?
<b>External Customers:</b>	List most effective methods: Instructor-led? Webinars? In-person? Online courses? On-the-job? Other?
<b>Other?</b>	List most effective methods: Instructor-led? Webinars? In-person? Online courses? On-the-job? Other?

# Training: What issues might pop up?

AUDIENCES:	DEPLOYMENT: What training deployment issues do you anticipate?
Affected Function or Department Leaders:	List possible hiccups: Low technical skills? Peak business-cycle demands? Telephone restrictions? Production impact? Travel schedules? Lack of technology? Others?
Affected Function or Department Employees:	List possible hiccups: Low technical skills? Peak business-cycle demands? Telephone restrictions? Production impact? Travel schedules? Lack of technology? Others?
Senior Leaders:	List possible hiccups...
Managers:	List possible hiccups...
Employees (Office):	List possible hiccups...
Employees (Field):	List possible hiccups...
Employees (Plant):	List possible hiccups...
External Channel Partners:	List possible hiccups...
External Vendors:	List possible hiccups...
External Customers:	List possible hiccups...
Other?	List possible hiccups...

# Training: Create your final plan!

AUDIENCES:	FINAL MODULES / RELEASES:	PREFERRED TRAINING METHODS:	DEPLOYMENT ISSUES TO NOTE OR AVOID:	TIMING:
Affected Function or Department Leaders:				
Affected Function or Department Employees:				
Senior Leaders:				
Managers:				
Employees (Office):				
Employees (Field):				
Employees (Plant):				
External Channel Partners:				
External Vendors:				
External Customers:				
Other?				