# General Information

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| --- | --- |
| **Project Name/Project #:** |  |
| **Business Process Owner/Sponsor:** |  |
| **Author:** |  |
| **Project End Date:** |  |

# Revision / Change History

|  |  |  |
| --- | --- | --- |
| **Revision Level** | **Revision Date** | **Description of Changes** |
| 01 | 5/10/11 | 1. Template version |
| 01 |  | 1. Initial project version |

*The Training Strategy defines the support activities, schedules, curriculum, methods and tools, and equipment required for system training.*

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

* Blue italicized text enclosed in square brackets (i.e., [text]) provides instructions to the document author, or describes the intent, assumptions and context for content included in this document.
* Blue text enclosed in angle brackets (i.e., <text>) indicates a field that should be replaced with information specific to the particular project.
* Text and tables in black are provided as boilerplate examples of wording and formats that may be used or modified as appropriate.

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# GENERAL INFORMATION

## Purpose

*[Describe the purpose of the Training Plan.]*

## Overview

*[Provide a brief system overview description as a point of reference for the remainder of the document.]*

## Assumptions

*[Describe any assumptions or dependencies specifically regarding the training of the system. These may concern such issues as: related software or hardware, operating systems, or end-user characteristics. If project is part of a larger solution existing standards for approach, tools, and documentation may exist.]*

## Risks

*[Describe any risks associated specifically with training of the system.]*

## Constraints

*[Describe any limitations or constraints that have an impact on the training of the system.]*

# TRAINING APPROACH

## Requirements

*[Describe or list the skills required to support the processes and tools being implemented in the project. Match those requirements to the existing personnel skill sets to determine the training needs for the project. Additionally, describe the skills required by end users to interact with the technical solution to include the level of which they must understand the tools delivered as well as process impacts that end users must be made aware of.]*

## Roles and Responsibilities

*[Identify the personnel and their responsibilities for identifying and developing the training materials. Identify the person and organization that will conduct the training.]*

## Techniques and Tools

*[Describe the training techniques to be used.* *These techniques may include computer-based instruction, web based training, self-paced written manual, peer training, hands-on practical sessions, instructor-led training, purchased package training, or any combination of the above. Also, identify the tools needed for the training, such as workstations, training manuals, classroom facilities, application software licenses, training registration system (i.e. LMS) and any resources. Include how the training will be administered to ensure broadest inclusion of those needed training and how progress will be tracked as well as feedback collected (i.e. electronic surveys).]*

## Target Audiences

*[Identify target audiences by starting with the user roles defined in the statement of requirements. With the list of target audiences defined, develop a training matrix where each audience is aligned with the training required or recommended.]*

## Prerequisites

*[Identify any prerequisites for individuals to receive training, and develop a strategy regarding prerequisite training as necessary.]*

## Schedule

*[Prepare a training schedule to include the following information:*

1. *Identification and development of course content and materials*
2. *Loading of content for web-based or video-based training*
3. *Planned training dates*
4. *Loading and administration of training system*
5. *Post training reporting*
6. *Names of students*
7. *Names of instructors*
8. *Location of sessions (factor in telepresence)*

*The schedule should be as comprehensive as possible; however, the schedule may be revised at later points in the project lifecycle.]*

## Curriculum

*[Briefly describe the curriculum for each proposed training class or attach course description from the vendor.]*

## Training Evaluation

*[Outline the metrics that will be captured and how they will be captured. Describe how feedback will be elicited from personnel to ensure that training objectives were met. Describe how the feedback received will be analyzed and what will be done with the analysis results to ensure that training objectives are met.*

*Some of the metrics that could be tracked include:*

1. *Training surveys with evaluation scores*
2. *Duration (estimated versus actual)*
3. *Number of attendees (estimated versus actual)*
4. *Percent of total attended*
5. *Training tests]*