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<COMPANY OR PROJECT LOGO>

<PROJECT NAME>

# TRAINING PLAN

VERSION <1.0>

<DD/MM/YYYY>



## TRAINING PLAN TEMPLATE

### VERSION HISTORY

*[Explain how the development and distribution of the Training Plan will be controlled and tracked. In the table below provide the version number, the author implementing the version, the date of the version, the name of the person approving the version, the date that particular version was approved, and a brief description of the reason for creating the revised version.]*

Version Number	Implemented By	Revision Date	Approved By	Approval Date	Description of Change
1.0	<Author name>	<mm/dd/yy>	<Project Manager name>	<mm/dd/yy>	<description of change>

## **Notes to the Author**

*[This Training Plan template includes instructions to the author, boilerplate text, and sections that should be replaced with the values specific to the project.]*

- *Blue italicized text enclosed in square brackets ([text]) provides instructions to the document author, or describes the intent, assumptions and context for content included in this document.*
- *Blue italicized text enclosed in angle brackets (<text>) indicates a field that should be replaced with information specific to a particular project.*
- *Text and tables in black are provided as boilerplate examples of wording and formats that may be used or modified as appropriate to a specific project. These are offered only as suggestions to assist in developing project documents; they are not mandatory formats.*

**When using this template, the following steps are recommended:**

1. *Replace all text enclosed in angle brackets (e.g., <Project Name>) with the correct field document values. These angle brackets appear in both the body of the document and in headers and footers.*
2. *Modify boilerplate text as appropriate for the specific project.*
3. *To add any new sections to the document, ensure that the appropriate header and body text styles are maintained. Styles used for the Section Headings are Heading 1, Heading 2 and Heading 3. Style used for boilerplate text is Body Text.*
4. *To update the Table of Contents, right-click on it and select "Update field" and choose the option - "Update entire table".*
5. *Before submission of the first draft of this document, delete this instruction section "Notes to the Author" and all instructions to the author throughout the entire document.*

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## 1.0 INTRODUCTION

*[This section of the Training Plan provides an executive summary of the entire plan. There is no need to provide information in this section if the descriptions provided in the subsequent sections are sufficient.]*

## 1.1 BACKGROUND AND SCOPE

*[Provides a brief description of the project from a management perspective. It identifies the system, its purpose, and its intended users. This subsection also provides a high-level summary of the Training Plan and its scope.]*

## 1.2 POINTS OF CONTACT

*[Provides the organization name and title of key points of contact for system development. It includes such points of contact as the Project Manager, Program Manager, QA Manager, Security Manager, Training Manager/Coordinator, and Training representative, as appropriate.]*

*[Add additional rows as needed. If the applicable team members are listed in the [Project Management Plan](#), reference the appropriate section within this document.]*

ROLE	Name	Contact Number
Business Sponsor		
Program Manager		
Project Manager		
QA Manager		
Configuration Manager		
Training Manager/Coordinator		
Training Representatives		

### 1.3 DOCUMENT ORGANIZATION

*[This subsection of the Training Plan describes the document's organization.]*

### 1.4 SECURITY AND THE PRIVACY ACT OR DATA PROTECTION

*[This subsection of the Training Plan, if applicable, provides a brief discussion of the system's security controls and the need for security and protection of sensitive data. If the system handles sensitive Data Protection Act or Privacy Act information, information should be included about labeling system outputs as sensitive or Privacy Act-related. In addition, if the Privacy Act protects the system, include a notification of the Privacy Act's civil and criminal penalties for unauthorized use and disclosure of system data.]*

### 1.5 GLOSSARY

*[This subsection of the Training Plan contains a glossary of all terms and abbreviations used in the plan. If it is several pages in length, it may be placed as an appendix.]*

## 2.0 INSTRUCTIONAL ANALYSIS

### 2.1 NEEDS AND SKILLS ANALYSIS

*[This subsection of the Training Plan describes the target audiences for courses to be developed. Target audiences may include technical professionals, user professionals, data entry clerks, clerical staff members, managers, and executives. 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. If appropriate, this subsection should discuss needs and courses in terms of staff location groupings, such as headquarters and field offices.]*

### 2.2 DEVELOPMENT APPROACH

*[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 requirements 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.]*

### 2.3 ISSUES AND RECOMMENDATIONS

*[This subsection of the Training Plan includes any current and foreseeable issues surrounding training. Recommendations for resolving each issue and constraints and limitations should also be listed. Review*

and update the [Risk Management Plan](#) with any new risk information uncovered during the development of this plan.]

## 3.0 INSTRUCTIONAL METHODS

### 3.1 TRAINING METHODOLOGY

*[This subsection of the Training Plan describes the training methods to be used in the proposed courses; these methods should relate to the needs and skills identified in Section 2.3, Needs and Skills Analysis, and should take into account such factors as course objectives, the target audience for a particular course, media characteristics, training criteria, and costs. 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 subsection. Sample formats of materials can be included in an appendix, if desired.]*

### 3.2 TRAINING DATABASE

*[This subsection of the Training Plan, if applicable, identifies and discusses the training database and how it will be used during computer systems training. It discusses the simulated production data related to various training scenarios and cases developed for instructional purposes. This subsection also explains how the training database will be developed. If this subsection is not applicable to the system involved, indicate "Not applicable."]*

### 3.3 TESTING AND EVALUATION

*[This subsection of the Training Plan describes methods used to establish and maintain quality assurance over the curriculum development process. 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 course or instructor evaluation form. 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.]*

## 4.0 TRAINING RESOURCES

### 4.1 COURSE ADMINISTRATION



*[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.]*

### 4.2 RESOURCES AND FACILITIES

*[This subsection of the Training Plan describes the resources required by both instructors and students for the training, including classroom, training, and laboratory facilities; equipment such as a projector, projection screen, flipchart or visual aids panel with markers, and computer and printer workstations; and materials such as memo pads and pencils, and slides. Information contained in this subsection 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 Section 5, Training Curriculum.]*

### 4.3 SCHEDULES

*[This subsection of the Training Plan presents a schedule for implementing the training strategy 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. This subsection provides an overview of tasks; deliverables, such as approach and evaluation forms; scheduled versus actual milestones; and estimated efforts, such as the work plan. In the final version of the Software Training Plan, actual course schedules by location should be included.]*

### 4.4 FUTURE TRAINING

*[This subsection of the Software Training Plan discusses scheduled training modifications and improvements. This information can include periodic updating of course contents, planned modifications to training environments, retraining of employees, and other predicted changes. Indicate procedures for requesting and developing additional training.]*

## 5.0 TRAINING MATERIALS LIST

### 5.1 PURPOSE AND SCOPE

The purpose of this document is to assist the project manager and project team in managing the training materials produced by the project as part of the <Project Release Name>. Training materials can include: seminars, presentations, workbooks, self-study tutorials, etc., associated with a software version release.

The Training Plan Template, located in the < Document Repository>, provides the framework for determining how the training materials will be identified, developed, and delivered. This should be a “living” document that is updated frequently to reflect new or changing training material information.

Although both the Training Plan and Training Material templates can be used by projects of any size, they are intended to be used mainly by the larger, more complex, and more critical projects.

## 5.2 TRAINING MATERIALS LIST

*[Populate the table below with the applicable information when the training material is being developed or delivered. Add or remove any columns as necessary.]*

Explanation of the table fields:

- Document Name: Provide the name of the document
- Version Number: Provide the version of the document being distributed (this information may already be in the Document Name)
- Document Format: Provide the format the document is saved or delivered as. This could be a:
  - Word Document
  - PowerPoint Presentation
  - Apps
  - Websites
  - Software / SaaS solutions
  - Etc.
- Date Delivered: Provide the date the training was provided or the documents were distributed.
- Intended Audience: Identify the target group that the document was created for. This could include:
  - Executive management
  - General Users
  - Power or Super Users
  - Technical Support Staff
- Storage Location: Identify the location the master documents are stored. For electronic documents, provide the network location. For printed documents, provide a physical location.

**Software Training Materials List for <Project or Release Name>**

## TRAINING PLAN TEMPLATE

Document Name	Version Number	Document Format	Date Delivered	Intended Audience	Storage Location

### 6.0 TRAINING CURRICULUM

*[This section 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 name; the length of time the course/module will take; the expected class size (minimum, maximum, optimal); the target audience; course objectives; module content/syllabus; specific training resources required, such as devices, aids, equipment, materials, and media to be used; and any special student 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.*

*Include an explanation to the following questions:*

- After the training is completed, what will happen to the training course materials, student information and other materials?*
- Who will own, manage and maintain the training materials in the future?*
- How will training materials be used in the future to train new staff?*
- How will training materials be used in the future for refresher training?]*

## APPENDIX A: Training Plan Approval

The undersigned acknowledge that they have reviewed the **<Project Name> Training Plan** and agree with the information presented within this document. Changes to this **Training Plan** will be coordinated with, and approved by, the undersigned, or their designated representatives.

Signature:

Date:

Print Name:

Title:

Role:

Project Manager

## APPENDIX B: REFERENCES

*[Insert the name, version number, description, and physical location of any documents referenced in this document. Add rows to the table as necessary.]*

*The following table summarizes the documents referenced in this document.*

Document Name	Description	Location
<i>&lt;Document Name and Version Number&gt;</i>	<i>&lt;Document description&gt;</i>	<i>&lt;URL or file path to where document is located&gt;</i>

## APPENDIX C: KEY TERMS

The following table provides definitions and explanations for terms and acronyms relevant to the content presented within this document.

Term	Definition
<i>[Insert Term]</i>	<i>&lt;Provide definition of term and acronyms used in this document.&gt;</i>

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