

TRAINING COURSE SETUP CHECKLIST

Who uses this form:

Users of this form include:

- Training Co-ordinators
- Training Administrators
- Trainers and facilitators

When to use this form:

Use this form when you are setting up an instructor-led training session and you need to ensure that all necessary setup activities have been completed successfully prior to session start.

This setup checklist covers the following areas:

- training rooms
- training aids
- training materials
- catering
- trainers
- participants
- managers/supervisors
- administrative forms

How to use this form:

1. Tailor the fields and setup tasks on the form for your specific organization
2. To edit the form, first remove form protection by clicking on the Developer tab > Protect Document/Restrict Editing > Restrict Formatting and Editing > Stop Protection (Excel 2003 and earlier: View > Toolbars > Forms > Protect Form)
3. Modify the checklist time periods to suit your organization
4. To add extra rows, select Table Tools > Layout tab > Insert Above (Excel 2003 and earlier: Table > Insert > Row)
5. Put your organization's instructions on how to complete the Setup Checklist on this first page
6. Set up the form as an administrative component of your organization's training delivery process
7. Prior to each course delivery, enter training course details in course details area at top of form
8. In task particulars area, for each task enter initials of person responsible in **Resp.** field
9. Print the form (set paper size to your media, e.g. Letter or A4)
10. Whilst undertaking setup tasks, check off in **Done** field as each task is completed

TRAINING COURSE SETUP CHECKLIST

Training Provider:		Course Name:	
Course Date:		Facilitator:	
Start Time:		Finish Time:	
Training Location:			

Done	Resp.	At least one week prior to training event
		Book training room/breakout rooms
		Book training aids (whiteboard, flipchart, datashow, laptop PC, CD/DVD player, VCR, monitor, pens, markers, name tags)
		Book event catering
		Schedule creation of participant materials (print, USB drive, CD/DVD etc)
		Obtain manager commitment to course introduction
		Send participant course information pack
		Update schedule with participant cancellations/reschedules
		Complete creation of participant materials
		Check materials for quality (print, binding, data errors, labels, number, etc)
		Check schedule information complete (Department, Role, etc)

Done	Resp.	Two days prior to training event
		Send reminder to caterers
		Send reminder to participants
		Verify schedule with trainer
		Send reminder to manager giving course introduction
		Organize security passes
		Update schedule with participant cancellations/reschedules
		Print latest schedule (two copies)
		Print participant feedback forms (with three extra copies)

Purchase our **Training Management Template Pack** to see all of the checklist items.

[Buy Now](#)

For the *complete and customizable* version of this checklist, check out our popular **Training Management Template Pack**. This checklist is simply one of a comprehensive set of form templates and guides included within the Template Pack.



Our **Training Management Template Pack** helps you manage training through all phases of your training administration and evaluation cycle. Rely on the experts to have you presenting a professionally presented and complete report, form or analysis in no time. The pack includes a comprehensive User Guide, instructions for each template and **BONUS** tool for diagnosing employee performance problems.

The templates and guides included in the pack are:

[Buy Now](#)

Before Training

1. Employee Performance Diagnostic Tool
2. Training and Development Plan Form
3. Training Needs Analysis Worksheet
4. Training Needs Analysis Spreadsheet
5. Vendor Enquiry Form
6. Vendor Selection Matrix
7. Learning Outcomes Template
8. Training Session Plan Template
9. Training Course Information Sheet
10. Training Registration Form
11. Training Schedule Spreadsheet

During Training

12. Training Course Setup Checklist
13. Training Attendance Form – Single
14. Training Attendance Form – Multi
15. Personal Action Plan Form
16. Skill Assessment Form – Individual
17. Skill Assessment Form – Group
18. Trainer Effectiveness Rating Form

After Training

19. Certificate of Completion
20. Training Participant Feedback Form
21. Training Participant Feedback Spreadsheet

What our customers say ...

“The Training Management Template Pack had just what I was looking for! From the Employee Performance Diagnostic Tool to the Training Needs Analysis Spreadsheet, this group of invaluable documents allows me to gather, diagnose and organize a plan quickly and efficiently. Thanks Business Performance.”

Tanya Ladd
Corporate Trainer

“As a training manager, I found the Training Management Template Pack especially helpful in documenting all the essential elements of a training plan.”

Brenda M. Rodriguez
BMR consulting

“My team and I are using the template pack to set up training projects and our evaluation system. We are pleased with the resource and have found it very user friendly and adaptable.”

Rayla Smoot
Kia Motors Manufacturing Georgia

Find out more and download the **Training Management Template Pack** from www.businessperform.com/training-management-pack

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