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 competed 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

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

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

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

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

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