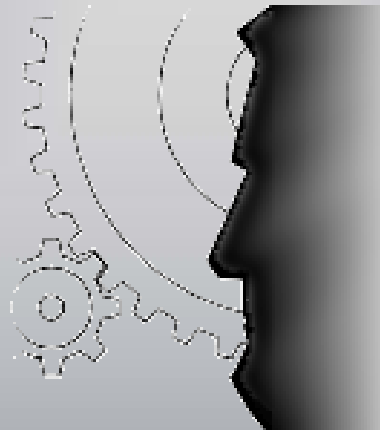


TRAINING MANAGEMENT TEMPLATE PACK



User Guide

Third Edition

Other Tools and Templates by Business Performance Pty Ltd:

Training Projects Template Pack
Training Evaluation Toolkit
Training Tracker
Training Management Maturity Model
From Training to Enhanced Workplace Performance
Writing Learning Outcomes
Managing Change in the Workplace
Organization Communication Assessment and Guide
A Guide to Project Management
Project Master
Project Scorecard
2 Way Feedback
Succession Planner
Career Enrichment Tool Kit

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1. Introduction

Congratulations on your purchase of the *Training Management Template Pack*. The *Template Pack* will serve your training management and administration needs during every phase of your training programs. We have supplied you practical templates and guides that you will find useful before training begins, during the conduct of the training program and also after the training has concluded.

Almost every business nowadays has the Microsoft Office suite of products with Microsoft Word and Microsoft Excel installed on their computers. It makes sense to leverage off the software that you already have to benefit from a relatively inexpensive and easy to use set of templates.

We have included within the *Template Pack* some examples of completed documents and workbooks. Use these to help you get familiar with creating work products. Check in to the *Training Management Template Pack* product web page at www.businessperform.com/training-management-pack from time to time for more sample completed documents.

All templates included within the pack are also customizable to suit your exact requirements. You may customize the templates yourself or you may allow us to customize them for you. Our contact details are located at the end of this guide.

2. System Requirements

The *Training Management Template Pack* is not a standalone program. It requires Microsoft Word and Microsoft Excel installed on your computer to display and use these templates. Versions of Microsoft Word and Microsoft Excel that will open the templates and guides with all features intact are Word and Excel 2002(XP), 2003, 2007 and 2010. The supplied *Employee Performance Diagnostic Tool* and *Training Session Plan Sample* require the Adobe Acrobat reader. A free copy of the reader may be obtained from the Adobe website at www.adobe.com/products/acrobat/readstep2.html

Operating system requirements are Windows Me, Windows NT, Windows 2000, Windows XP, Windows Vista or Windows 7.

Hardware requirements are any IBM PC or IBM PC compatible computer capable of running at least one of the above versions of Microsoft Windows, Microsoft Word and Microsoft Excel for Windows. Some of the features in the supplied templates and guides are not compatible with Microsoft Word and Microsoft Excel for Macintosh. Business Performance Pty Ltd does not support the use of this *Template Pack* on Macintosh computers. If you received the *Template Pack* files on a portable medium, such as CDROM or flash drive, you will need hardware that is able to read from the portable medium. You will also need at least 20 megabytes of free hard disc space. The templates and guides are best displayed with a screen resolution of 800 by 600 or above.

3. Getting Started

To use the *Training Management Template Pack* effectively, you will need at least a basic understanding of Microsoft Word and Microsoft Excel. If you are currently a beginner in Word and Excel or have had no previous experience, there are a number of helpful books and Word and Excel courses available to suit the beginner all the way through to advanced users. This *User Guide* assumes that you are at least familiar with the basics of working with Word documents and Excel spreadsheets.

Similarly, this guide assumes that you have at least a basic understanding of what is required in managing a training function. For a range of useful information on managing a training enterprise and administering training programs, visit the training management section of our website at www.businessperform.com/training

Further information about managing training can be found at the following websites:

American Society for Training and Development	www.astd.org
Canadian Society for Training and Development	www.ostd.ca
Australian Institute of Training and Development	www.aitd.com.au
Irish Institute of Training and Development	www.iitd.ie
Philippine Society for Training and Development	http://www.pstd.org
New Zealand Association for Training and Development	www.nzatd.org.nz
Dutch Training and Development Association	www.nvo2.nl
Singapore Training and Development Association	www.stada.org.sg
Institute of Personnel and Development	www.ipd.co.uk
Institute of People Management	www.ipm.co.za
Academy of Human Resource Development	www.ahrd.org

To Install the Training Management Template Pack

The *Training Management Template Pack* consists of a number of files. These files are compressed into a single zip file. You may have downloaded the *Training Management Template Pack* compressed file from our internet site, received it on a flash drive or CDROM or via email. However you received it, to get started, follow the steps below:

1. Go to the location where you saved the *Template Pack* compressed zip file `trainmngmtpack.zip` (e.g., C:\Downloads or D:).
2. Right-click on the compressed `trainmngmtpack.zip` file and select Extract All or Extract To from the list of options. Alternatively, double-click on the zip file to open it.
3. Follow your extraction program's prompts or instructions to decompress the files to the drive or folder on your computer where you would like to store the *Template Pack* files.
4. If your computer does not recognize zip files, visit www.winzip.com or www.7-zip.org to download the zip file extraction program.
5. The *Template Pack* files are extracted to a subfolder named `TrainMngmtPack`

6. To open a template or guide, either:
 - a) go to the location in which you extracted the files and double-click on the selected file

OR

 - b) start up Microsoft Word or Microsoft Excel, click the Microsoft Office Button/File tab and select Open (Excel 2003 and earlier: select File > Open from the main menu bar), navigate to the location in which you extracted the files, select the file you wish to open and click the Open button.

Congratulations, you are now ready to begin learning more about the *Training Management Template Pack* and managing your organization's training activities. For an overview of using the *Template Pack*, you can start by reading the *Quick Start Guide* included with the installation pack.

What is a Zip file?

A zip file is a computer file that can package a number of files into a single file. The files stored in a zip file can be of many kinds: documents, graphics, sound files, and so on. In addition, the files stored in a zip file are compressed to save disk space and download time when someone downloads the file from the internet. You can tell a zip file from the .zip on the end of the file name.

4. Saving Template Pack Files

After you have customized a template to suit your particular circumstances and added your own information, save it with a filename that makes sense to you. Saving it with the same filename will overwrite the original template. If you inadvertently overwrite or lose an original template file, simply reinstall the *Template Pack*.

The template files in this *Template Pack* are supplied in the Word/Excel 97-2003 Document/Workbook (Compatibility Mode) format to ensure maximum compatibility with all versions of Microsoft Word and Microsoft Excel. If you are sure that everyone opening your documents and workbooks will be using Word and Excel 2007 or 2010, then you may save your documents as Word Document (*.docx) and your workbooks as Excel Workbook (*.xlsx). If people will be opening your document or workbook with Word and Excel 2002(XP) or 2003, then save your documents as type Word 97-2003 Document (Compatibility Mode) and your workbooks as type Excel 97-2003 Workbook (Compatibility Mode). Saving with this file type will ensure maximum compatibility with earlier versions of Word and Excel.

5. Template Pack Summary

The *Training Management Template Pack* consists of 24 template and guide files. The instructions for the effective use of each template are included with the template, usually on a cover sheet. Each template is categorized according to the phase of the program in which it is used; before the training begins, during the training program or after the program is completed. The following phase diagram illustrates these three phases and the templates used during each phase. Some templates may be used in more than one phase. In these cases, the diagram indicates the first phase in which a template is used. The diagram is also a convenient summary of the complement of templates included within the pack.

Template locations within program phases



6. File Description Format

The table on the following pages describe in detail each template, guide and sample file contained within the *Template Pack*. The format for the presentation of this information is as follows:

No.	Template/Guide Name <i>Short description of the template/guide</i> Template/Guide File Name <i>Short description of the sample (if available)</i> Template Sample File Name	Comprehensive description of the template and guide and its purpose (Document Format) Description of the template sample and its purpose (Document Format)
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Within the template description, click on the hyperlinked document file name to open the document on your computer.

Note: Hyperlinks will not to function if:

- a) the *User Guide* is moved to a folder different from the location of the template pack files, or
- b) your computer does not have installed the program required to open the file.

7. Template Pack File Descriptions

Before Training

<p>1.</p>	<p>Employee Performance Diagnostic Tool</p> <p><i>Flow chart and guide for diagnosing employee performance shortfalls</i></p> <p>EmployeePerformanceDiagnostic.pdf</p>	<p>Ever had participants on a training course that should not have been there? This employee performance diagnostic chart will help you and your managers and supervisors identify when training is the appropriate solution. If training is not the right approach, the source of the employee performance shortfall is quickly identified.</p> <p>The flow chart and one page guide is easy for all to use and will serve as a constant wall chart reference in managing employee performance. (Adobe Acrobat)</p>
<p>2.</p>	<p>Training and Development Plan Form</p> <p><i>Form that documents employee training and development plan</i></p> <p>DevelopmentPlanForm.doc</p>	<p>Managers and supervisors use this form to document an agreed employee training and development plan. A well-constructed plan that involves the employee and is acted upon serves to focus learning activities in areas of greatest need and improves employee commitment and motivation.</p> <p>This form encourages plan implementation through helping articulate specific actions and outcomes, resource requirements and time frames. (MS Word)</p>
<p>3.</p>	<p>Training Needs Analysis Worksheet</p> <p><i>Interview worksheet for guiding and recording training needs interviews</i></p> <p>TrainingNeedsAnalysisWorksheet.doc</p>	<p>This TNA worksheet will assist you plan and conduct interviews during your training needs analysis. Improve your credibility and effectiveness by asking all the right questions of managers, program sponsors and employees. The interview structure includes questions on reasons for request, objectives, participant profile and task analysis. (MS Word)</p>

<p>4.</p>	<p>Training Needs Analysis Spreadsheet</p> <p><i>Spreadsheet that tabulates, calculates and reports training needs</i></p> <p>TrainingNeedsAnalysisSpreadsheet.xls</p>	<p>This TNA spreadsheet will allow you to record and report quickly and easily on training needs for a team, department or organization. With easy data entry, the sheet will tabulate your information and report summary data.</p> <p>The sheet calculates and reports automatically a number of summary totals, including number of attendees for each course and all courses, number of attendees from each role/department and total training hours for each employee/role/department. It is packaged with instructions and can be customized to your specific requirements. (MS Excel)</p>
<p>5.</p>	<p>Vendor Enquiry Form</p> <p><i>Form that guides interviewer through interview with training vendor</i></p> <p>VendorEnquiryForm.doc</p>	<p>Some or all of your training may be designed and developed by external training providers. Deciding which vendor services to use is made easier through the use of this patterned interview form. The form is adaptable in a variety of situations, including telephone call, video call or face-to-face meeting. It covers the four key areas critical to the success of your training program and you can easily add, edit and remove questions. (MS Word)</p>
<p>6.</p>	<p>Vendor Selection Matrix</p> <p><i>Spreadsheet for recording and analyzing training vendor selection data</i></p> <p>VendorSelectionMatrix.xls</p> <p><i>Sample of a completed training vendor selection decision matrix</i></p> <p>VendorSelectionMatrixSample.xls</p>	<p>Selecting an external training provider to design and deliver your training program can be confusing. Use this customizable best practice decision tool to clarify your requirements and evaluate vendors. Each vendor is evaluated against your mandatory and non-mandatory requirements, with a score assigned to each. A final report identifies for you the winning vendor. Use the <i>Vendor Enquiry Form</i> included with this pack to collect the data to enter into the matrix. (MS Excel)</p> <p>The sample vendor selection matrix demonstrates a completed analysis and report. (MS Excel)</p>
<p>7.</p>	<p>Learning Outcomes Template</p> <p><i>Template for developing and documenting learning outcomes</i></p> <p>LearningOutcomesTemplate.doc</p>	<p>Writing effective learning outcomes is a necessary precursor to developing a relevant and focused training program. This template will help you in developing terminal and enabling objectives for your program that are focused on participants' workplace performance. (MS Word)</p> <p>The comprehensive guide, <i>Writing Learning Outcomes - A Practical Guide and Workbook</i>, is available from our website at www.businessperform.com/writing-learning-outcomes.</p>

<p>8.</p>	<p>Training Session Plan Template</p> <p><i>Template for creating a trainer's lesson plan for each training session</i></p> <p>TrainingSessionPlanTemplate.doc</p> <p><i>Sample of a completed training session plan</i></p> <p>TrainingSessionPlanSample.pdf</p>	<p>Each training session needs to be planned in advance. In addition, effective trainers use a summary guide to prepare them before session start and to direct them during the session. This template maps out the learning outcomes, equipment and materials required, timings for each section of the session and other necessities required for success. (MS Word)</p> <p>Review the sample training session plan to see how a training session plan document looks when completed. (Adobe Acrobat)</p>
<p>9.</p>	<p>Training Course Information Sheet</p> <p><i>Template for communicating training course information to participants</i></p> <p>CourseInformationSheet.doc</p>	<p>Trainers and administrators use this straightforward template to ensure that training participants are advised clearly of all important course details. Use it for one off training courses as well as for regularly repeated programs. It is also suitable for both internally and externally conducted courses. (MS Word)</p>
<p>10.</p>	<p>Training Registration Form</p> <p><i>Form that registers prospective participant's interest in a training course</i></p> <p>TrainingRegistrationForm.doc</p>	<p>Make sure that the right employees receive the right training and with appropriate workplace support at the outset. This training registration form records the usual participant and training course particulars.</p> <p>In addition, with this supercharged form you will guarantee that funding is allocated, the proposed training is relevant to the needs of the organization, other options were considered, managers visibly support the training and that learning will be applied in the workplace. The form may be completed by participants and managers in soft or hardcopy. (MS Word)</p>
<p>11.</p>	<p>Training Schedule Spreadsheet</p> <p><i>Spreadsheet for managing a training course schedule</i></p> <p>TrainingScheduleSpreadsheet.xls</p>	<p>This spreadsheet will allow you to manage effectively your organization's training schedule for each course. Initially, use the nominations list to work with managers, supervisors, training consultants and subject matter experts to identify course nominees. Then use the schedule to keep track of attendance, reschedules and withdrawals.</p> <p>The sheet provides four summary reports on nominations, class composition and attendance status. Each report is updated automatically and the sheet can be expanded easily to accommodate any number of participants per class and any number of classes. Full instructions are included. (MS Excel)</p>

<i>During Training</i>		
12.	<p>Training Course Setup Checklist</p> <p><i>Checklist for organizing and preparing for a training session</i></p> <p>TrainingSetupChecklist.doc</p>	<p>This easy to use and customizable checklist is for trainers and administrators setting up an instructor-led training session. It will ensure that no preparation task is inadvertently missed by providing prompts at various points before the event and at the conclusion of the session.</p> <p>The checklist provides prompts in a number of areas, including venue, aids, materials, catering, communication and forms. The form may be completed in soft or hardcopy. (MS Word)</p>
13.	<p>Training Attendance Form – Single Session</p> <p><i>Form that records participant attendance for a single training session</i></p> <p>TrainingAttendanceFormSingle.doc</p>	<p>Use this form when you require objective evidence that participants have attended or completed training. This form is suitable for courses consisting of one session only and captures each participant's particulars and their attendance status. (MS Word)</p>
14.	<p>Training Attendance Form – Multi-session</p> <p><i>Form that records participant attendance for multiple training sessions</i></p> <p>TrainingAttendanceFormMulti.doc</p>	<p>Use this form when you require objective evidence that participants have attended or completed training. This form is suitable for courses consisting of more than one session and captures each participant's particulars and their attendance status. (MS Word)</p>
15.	<p>Personal Action Plan Form</p> <p><i>Form that documents a participant's personal action plan</i></p> <p>PersonalActionPlanForm.doc</p>	<p>Trainers use this form to encourage training program participants to document an action plan for implementing knowledge and skills learned during the program.</p> <p>Once participants return to the workplace, time pressures and a negative workplace climate often work against participants trying out and entrenching their newly learned skills. Thinking through and completing a personal action plan assists participants in overcoming potential workplace barriers to application. (MS Word)</p>

<p>16.</p>	<p>Skill Assessment Form – Individual</p> <p><i>Form for conducting an individual participant's skill assessment</i></p> <p>SkillAssessmentForm-Individual.doc</p>	<p>Training assessors use this form to assess whether a training program participant met the program exit requirements. Without effective skill assessments, trainers and participants' managers may never know whether the participants achieved the program's learning objectives.</p> <p>The form includes provision for entering the assessment criteria, assessment results, additional notes and feedback comments for the participant. (MS Word)</p>
<p>17.</p>	<p>Skill Assessment Form – Group</p> <p><i>Spreadsheet for recording skill assessment results for a group of participants</i></p> <p>SkillAssessmentForm-Group.xls</p>	<p>Use this spreadsheet to record participant assessment results in cases where participants are assessed through a series of skill-based activities. These could include demonstrations, case studies, role plays, workplace assignments and so on.</p> <p>The sheet automatically calculates and reports the following summary results: the number of activities passed for each participant and the number of participants passing each activity. (MS Excel)</p>
<p>18.</p>	<p>Trainer Effectiveness Rating Form</p> <p><i>Rating instrument for assessing trainer and training session</i></p> <p>TrainerEffectivenessRatingForm.doc</p>	<p>This rating instrument is used to assess the competence of a trainer and the quality of training delivery. The instrument incorporates the principles of adult learning and accepted training best-practice.</p> <p>Training dimensions evaluated include clarity of purpose, motivational methods, fostering relationships, session structure and techniques used. The end result is an actionable report on the trainer's key strengths and areas for improvement. (MS Word)</p>

After Training	
<p>19. Certificate of Completion</p> <p><i>Certificate awarded to training program participants who complete successfully the requirements of the program</i></p> <p>Certificate.doc</p>	<p>Training program participants and their managers at times require documentation that verifies the successful completion of a training program. In addition, the awarding of certificates can provide an important motivator for many to achieve the program's learning objectives.</p> <p>This no-fuss and customizable form is designed to be completed manually for each successful participant. Placeholders exist for all of the key pieces of information that you will need for a professionally presented certificate. (MS Word)</p>
<p>20. Certificate of Completion (Mail Merge) and Data Source</p> <p><i>Mail merge version of Certificate of Completion</i></p> <p>CertificateMailMerge.doc</p> <p><i>Data source file for use with mail merge version of Certificate of Completion</i></p> <p>CertificateData.doc</p>	<p>Where there are more than a few training program participants, creating participant certificates can be both laborious and time consuming. This form is designed to merge data from a separate participant data file for fast and efficient production of <i>Certificates of Completion</i>.</p> <p>The data file is preformatted, ready to accept your participant particulars. See <i>Section 7</i> below for instructions on how to customize and print your certificates using Microsoft's mail merge feature and this template. (MS Word)</p>
<p>21. Training Participant Feedback Form</p> <p><i>Participant questionnaire for canvassing reactions to training program</i></p> <p>TrainingParticipantFeedbackForm.doc</p>	<p>Now that you have conducted the training program, how effective was it? This training evaluation form canvasses training program participant reactions on all the important dimensions. Questions are included on linkage to the workplace, management support, facilitator competence, effectiveness of materials, the training environment and assessments. The form may be completed by participants in soft or hardcopy. (MS Word)</p>
<p>22. Training Participant Feedback Spreadsheet</p> <p><i>Spreadsheet for analyzing and reporting training participant feedback results</i></p> <p>TrainingParticipantFeedbackSpreadsheet.xls</p>	<p>Trainers use this spreadsheet to enter, store, analyze and report the results of the training participant feedback questionnaire. The sheet is customizable to accommodate a variety of survey questions and formats.</p> <p>Sheets are set up for easy data entry, whilst the reports present a useful group of summary results and charts. Summary data reported includes average score for each question, response rate, variability and program success factors. Use this template in conjunction with the included <i>Training Participant Feedback Form</i>. (MS Excel)</p>

8. Customizing and Printing Certificates

The *Certificate of Completion* templates included within this pack allow you to set up and print certificates for some or all of your training program participants. If your training program is small with not many participants, you can simply create and print each certificate manually using the standalone *Certificate of Completion* (Item 19). For this option, open the template *Certificate.doc* and replace the information placeholders with your program and participant information. Finally, print each certificate.

If your program is large with many participants, then use Microsoft Word's mail merge feature in conjunction with the *Certificate of Completion (Mail Merge)* and *Data Source* templates (Item 20). See page 11 for template descriptions.

Setting up a mail merge to print your certificates requires you to set up two documents:

1. certificate form that contains the layout and placeholders (*CertificateMailMerge.doc*)
2. data source file that stores the names of your participants (*CertificateData.doc*).

How you perform the mail merge depends on the version of Microsoft Word installed on your system. Instructions for setting up and printing the certificates using mail merge for the various versions of Microsoft Word are set out below.

Microsoft Word 2007 and later

1. Open the mail merge data source file *CertificateData.doc*
2. Replace sample participant names with your course participant names.
3. Add extra rows to the data table as required.
4. Open the certificate form *CertificateMailMerge.doc*
5. Add program name, date and trainer name to the certificate form.
6. Insert your company's logo.
7. Customize the remainder of the certificate form to suit your requirements.
8. Select the Mailings tab.
9. In the Start Mail Merge group, click Select Recipients.
10. Select Use Existing List.
11. Navigate to the location of your edited data source file *CertificateData.doc*
12. Click the Open button.
13. On the Mailings tab, click the Preview Results button.
14. Click on the right and left arrows (Previous/Next Record) to preview your mail merge.
15. Click on the Finish and Merge button.
16. Select Print Documents to begin printing your certificates.

Microsoft Word 2003 and earlier

1. Open the mail merge data source file `CertificateData.doc`
2. Replace sample participant names with your course participant names.
3. Add extra rows to the data table as required.
4. Open the certificate form `CertificateMailMerge.doc`
5. Add program name, date and trainer name to the certificate form.
6. Insert your company's logo.
7. Customize the remainder of the certificate form to suit your requirements.
8. Show the Mail Merge toolbar (View > Toolbars > Mail Merge).
9. Click on the Open Data Source button.
10. Navigate to the location of your edited data source file `CertificateData.doc`
11. Click the Open button.
12. Click on the View Merged Data button in the toolbar.
13. Click on the right and left arrows (Previous/Next Record) to preview your mail merge.
14. Click on the Merge button to begin printing your certificates.

For more information on using Microsoft Word's mail merge feature, look up *mail merge* in the Microsoft Word Help system.

9. How to Contact Us

We appreciate your comments and feedback and encourage you to drop us a line. Your feedback will help us to further enhance our products so that we can even better meet your needs.

You can contact us at:

Email address:	feedback@businessperform.com
Telephone:	+61 (0)408 314941
Skype:	business.performance
Website:	www.businessperform.com

10. About Business Performance Pty Ltd

Established in 2003, Business Performance Pty Ltd provides business and management consulting services globally. The company delivers coaching and consulting services in a range of business areas, from small business, leadership and management, strategic planning and organizational change to employee development and career coaching. All services are provided by highly experienced consultants specializing in their area of expertise.

From its website, Business Performance Pty Ltd also proudly supplies a wide selection of business and management software products designed to make managing organizations easier and more effective. Products featured include tools, templates and guides in the areas of training and employee development, project management, organizational change, career planning and web development. All products can be purchased and downloaded easily from anywhere in the world from the Business Performance Pty Ltd website at www.businessperform.com.

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