

# TRAINING PROJECTS TEMPLATE PACK



## User Guide

Third Edition

**Other Tools and Templates by Business Performance Pty Ltd:**

Training Management 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 Projects Template Pack*. The *Template Pack* will serve your training project needs during every phase of your training project. We have supplied you practical templates and guides that you will find useful during the plan, analyze, design, develop, implement and evaluate phases of your project.

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 Projects Template Pack* product web page at [www.businessperform.com/training-project-pack](http://www.businessperform.com/training-project-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 Projects 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 *Training Project Definition Sample* 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](http://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 Projects 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 project. For information on project management principles and methods, visit the project management section of our website at [www.businessperform.com/project](http://www.businessperform.com/project)

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

Project Management Institute	<a href="http://www.pmi.org">www.pmi.org</a>
International Project Management Association	<a href="http://www.ipma.ch">www.ipma.ch</a>
Institute of Project Management of Ireland	<a href="http://www.projectmanagement.ie">www.projectmanagement.ie</a>
Australian Institute of Project Management (AIPM)	<a href="http://www.aipm.com.au">www.aipm.com.au</a>

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### To Install the Training Projects Template Pack

The *Training Projects Template Pack* consists of a number of files. These files are compressed into a single zip file. You may have downloaded the *Training Projects 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 `trainprojectpack.zip` (e.g., C:\Downloads or D:).
  2. Right-click on the compressed `trainprojectpack.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](http://www.winzip.com) or [www.7-zip.org](http://www.7-zip.org) to download the zip file extraction program.
  5. The *Template Pack* files are extracted to a subfolder named `TrainProjectPack`
  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 Projects Template Pack* and managing your training project. 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*.

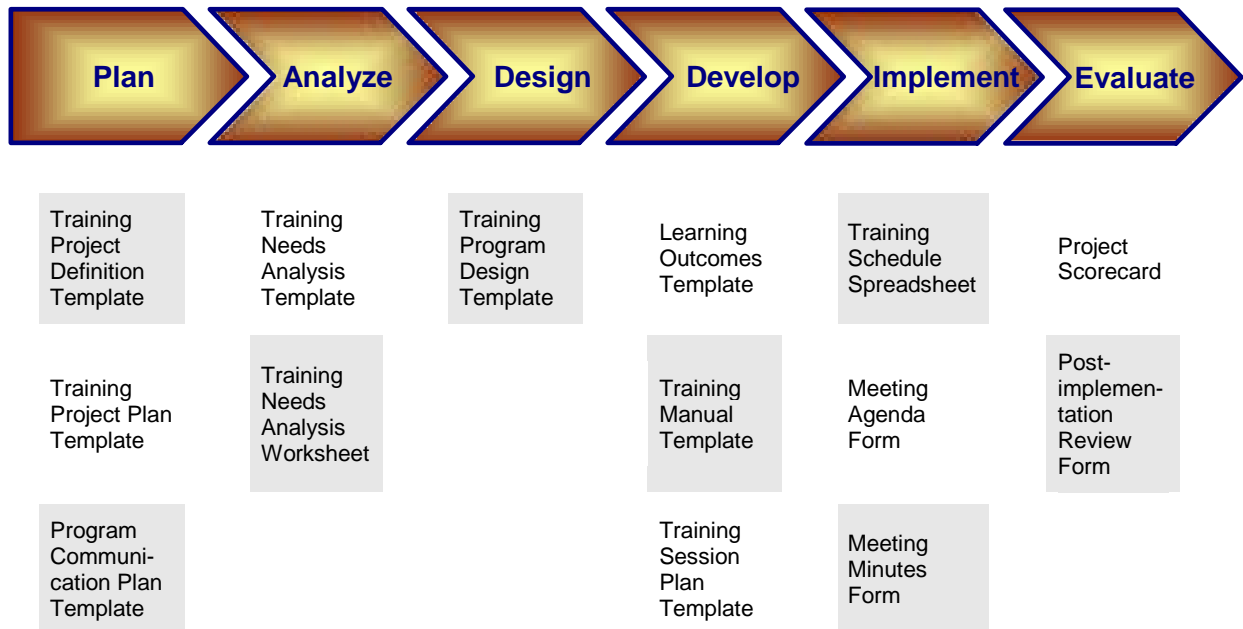
The template files in this *Template Pack* are supplied in the Word/Excel 97-2003 Document/Workbook (Compatibility Mode) format to ensure maximum compatibility with all versions of Microsoft Word and Microsoft Excel. If you are sure that everyone opening your documents and workbooks will be using Word 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 Projects Template Pack* consists of 14 template and guide files. Each template is complete with instructions on how to make full use of its power and versatility. For the simpler templates, the template instructions are included with the template. For the more complex templates, the detailed instructions are packaged as a separate guide.

Each template is categorized according to the phase of the training project in which it is used. The following phase diagram illustrates the project phases and the templates used during each phase. The diagram is also a convenient summary of the complement of templates included within the pack.

### Template locations within project 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:

<b>No.</b>	<b>Template/Guide Name</b>  <i>Short description of the template</i>  <a href="#">Template File Name</a>  <i>Short description of the guide (if available)</i>  <a href="#">Template Guide File Name</a>  <i>Short description of the sample (if available)</i>  <a href="#">Template Sample File Name</a>	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

<b>Plan</b>		
<b>1.</b>	<p><b>Training Project Definition Template and Guide</b></p> <p><i>Template for producing and documenting a project definition</i></p> <p><a href="#">TrainingProjectDefinitionTemplate.doc</a></p> <p><i>Guide for producing and documenting a project definition</i></p> <p><a href="#">TrainingProjectDefinitionGuide.doc</a></p> <p><i>Sample of a completed project definition document</i></p> <p><a href="#">TrainingProjectDefinitionSample.pdf</a></p>	<p>Successful projects begin with a succinct definition of what the project is about – a definition that all major stakeholders can agree with. This template will help you clarify and agree the project's objectives, basic approach, what is within and out of scope, project deliverables, roles, resources, risks and milestones. Your project is then ready for handover to the Project Manager for a flying start. The Template and Guide are packaged as two separate files. (MS Word)</p> <p>Review the sample project definition to see how a project definition document looks when completed. (Adobe Acrobat)</p>
<b>2.</b>	<p><b>Training Project Plan Template and Guide</b></p> <p><i>Template for producing and documenting a training program project plan</i></p> <p><a href="#">TrainingProjectPlanTemplate.doc</a></p> <p><i>Guide for producing and documenting a training program project plan</i></p> <p><a href="#">TrainingProjectPlanGuide.doc</a></p>	<p>This training project plan template will guide you through all of the important aspects of managing a successful training project. Project dimensions covered include objectives, scope, stakeholder analysis, risk, issues and change control, resource needs, communication plan, program summary, milestones, schedule and budget. The Template and Guide are packaged as two separate files. (MS Word)</p>
<b>3.</b>	<p><b>Program Communication Plan Template</b></p> <p><i>Proforma plan for communicating with stakeholders about various aspects of the training program throughout the life of the program</i></p> <p><a href="#">ProgramCommunicationPlan.doc</a></p>	<p>Every training project must satisfy a variety of key stakeholders, from the program sponsor and instructional designers to program participants and their managers. Each stakeholder needs to be kept informed as often as and in a manner that suits them if the project is to be a success. This template guides you through the various communication requirements and helps you to document them in a concise manner. (MS Word)</p>

## Analyze

<p>4.</p>	<p><b>Training Needs Analysis Template and Guide</b></p> <p><i>Template for conducting and documenting a formal training needs analysis</i></p> <p><a href="#">TrainingNeedsAnalysisTemplate.doc</a></p> <p><i>Guide for conducting and documenting a formal training needs analysis</i></p> <p><a href="#">TrainingNeedsAnalysisGuide.doc</a></p>	<p>Make sure the training you design or buy in satisfies the organization's real needs by using this TNA template. Analysis sections include scope, objectives, stakeholders, target participants, task analysis, constraints, learning transfer and selection criteria. The Template and Guide are packaged as two separate files. (MS Word)</p>
<p>5.</p>	<p><b>Training Needs Analysis Worksheet</b></p> <p><i>Interview worksheet for guiding and recording training needs interviews</i></p> <p><a href="#">TrainingNeedsAnalysisWorksheet.doc</a></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 precipitating reasons, organization's objectives, participant characteristics, performance objectives, potential barriers and task requirements. (MS Word)</p>

## Design

<p>6.</p>	<p><b>Training Program Design Template and Guide</b></p> <p><i>Template for producing and documenting a training program high-level design</i></p> <p><a href="#">TrainingProgramDesignTemplate.doc</a></p> <p><i>Guide for producing and documenting a training program high-level design</i></p> <p><a href="#">TrainingProgramDesignGuide.doc</a></p>	<p>Ensure that training program development does not go off the rails with this training program design template. Using a structured approach, you will be guided through all of the important considerations for effective program design. Sections include scope, purpose, resource requirements, design parameters, implementation requirements and selection criteria. The Template and Guide are packaged as two separate files. (MS Word)</p>
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<b>Develop</b>		
<b>7.</b>	<p><b>Learning Outcomes Template</b></p> <p><i>Template for developing and documenting learning outcomes</i></p> <p><a href="#">LearningOutcomesTemplate.doc</a></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 <a href="http://www.businessperform.com/writing-learning-outcomes">www.businessperform.com/writing-learning-outcomes</a>.</p>
<b>8.</b>	<p><b>Training Manual Template</b></p> <p><i>Template for compiling a training program participants' manual</i></p> <p><a href="#">TrainingManualTemplate.doc</a></p>	<p>A well designed and produced training manual not only assists trainees during the program, but also acts as a valuable resource back on the job. With this template, instructional designers and trainers can construct a professional looking manual. The template includes preset formats for headings, tables, headers and footers, and so on. The suggested structure and the many practical tips included ensure that nothing is left to chance. (MS Word)</p>
<b>9.</b>	<p><b>Training Session Plan Template</b></p> <p><i>Template for creating a trainer's lesson plan for each training session</i></p> <p><a href="#">TrainingSessionPlanTemplate.doc</a></p> <p><i>Sample of a completed training session plan</i></p> <p><a href="#">TrainingSessionPlanSample.pdf</a></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>

## Implement

<p>10.</p>	<p><b>Training Schedule Spreadsheet</b></p> <p><i>Spreadsheet for managing a training course schedule</i></p> <p><a href="#">TrainingScheduleSpreadsheet.xls</a></p>	<p>The Training Schedule spreadsheet manages your organization's training schedule for each course. Initially, use the nominations list 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>
<p>11.</p>	<p><b>Meeting Agenda Form</b></p> <p><i>Template for preparing a meeting agenda prior to a meeting</i></p> <p><a href="#">MeetingAgendaForm.doc</a></p>	<p>Throughout your project, you and your project team members will conduct a variety of meetings throughout all phases of the project. Use this form to create a clear and well-structured agenda. At the bottom of the form, you will be guided by ten essential tips for running productive meetings. (MS Word)</p>
<p>12.</p>	<p><b>Meeting Minutes Form</b></p> <p><i>Template for preparing meeting minutes recording meeting proceedings</i></p> <p><a href="#">MeetingMinutesForm.doc</a></p>	<p>An efficiently run training project requires well-documented meeting minutes. This meeting minutes proforma contains all of the fields needed to capture the essential meeting proceedings, actions and decisions. The form includes helpful tips and hints for what information to place in each field. (MS Word)</p>

<b>Evaluate</b>		
<b>13.</b>	<p><b>Project Scorecard</b></p> <p><i>Spreadsheet for monitoring and reporting project performance</i></p> <p><a href="#">ProjectScorecard.xls</a></p>	<p>Use the Project Scorecard during and at the conclusion of your project to monitor and report project performance. The Scorecard calculates and reports performance in five key result areas: cost, delivery, effort, scope and team satisfaction. Simply enter your project's approved/planned outcomes and tolerance levels and the Scorecard calculates automatically variances from approved/planned amounts and displays a Met/Not Met indicator for each key result area.</p> <p>For ease of reporting, the results are displayed visually on a single page summary Scorecard sheet. The sheet is packaged with complete instructions for use and can be customized to your requirements. (MS Excel)</p>
<b>14.</b>	<p><b>Post-implementation Review Form</b></p> <p><i>Project team member questionnaire for evaluating team satisfaction</i></p> <p><a href="#">Post-ImplementationReviewForm.doc</a></p>	<p>How successful was your project and how can you improve further the performance of your next project? Encourage your project team to reflect on team performance and to uncover valuable learnings for the future with this comprehensive team member questionnaire. Important areas covered include team ownership, project management, resourcing and support, clarity of project roles, communication and professional growth. (MS Word)</p>

After you have customized a template to suit your particular circumstances and populated it with your own data, 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*.

## 8. 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:

<b>Email address:</b>	<a href="mailto:feedback@businessperform.com">feedback@businessperform.com</a>
<b>Telephone:</b>	+61 (0)408 314941
<b>Skype:</b>	business.performance
<b>Website:</b>	<a href="http://www.businessperform.com">www.businessperform.com</a>

## 9. 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](http://www.businessperform.com).

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