

Planning Training

A training plan includes the overall goals, learning objectives, and activities that are to be performed to develop, conduct, control, and evaluate instructions that are to be provided to users, operators, administrators, and support staff who will use, operate, and/or otherwise support the solution.

Training materials are any resources created to support the training plan including the documentation associated with the deployment of the business product. This includes, but is not limited to, instructor and student guides, audio-visual aids, and computer-based or other media used to disseminate information about the final product to the target audience that is in need of the instruction.

Training planning is one component of a much broader knowledge transfer process. Transferring knowledge is necessary to facilitate the transition of the project's product from the project stage into operations and its integration into the client's environment. Effective training planning is a practice that is executed throughout the project life cycle. Identification and gathering of training requirements should begin early during the design phase with the initial identification of business, technical, user, and maintenance procedures. Initial draft outlines and associated training plans and materials are created. These artifacts are finalized later in the project's life cycle and validated during the testing phase. If necessary, adjustments are made to finalize these materials before implementation. Training for using, operating, and maintaining the project's product, and its supporting components, is performed before transitioning into the operation and maintenance phase.

A Training Plan is a document that communicates to management and stakeholders details of the proposed training program. An approved training plan authorizes the project team to expend resources for the development, implementation, and

execution of the proposed training program. The document outlines critical information regarding the training program's objectives, schedule, strategies for designing and developing curriculums and supporting training materials, methods for implementation, campaigns for continuous improvement, and helps to ensure that stakeholders are properly trained for their specific job function. The training plan outlines information pertaining to items such as training requirements, strategy, schedule, resources, environment, or materials.

The process of actually developing a training program, supporting training materials, and its associated training plan, typically utilizes a five phased Instructional System Design (ISD) approach:

- **Analysis** – identifies existing knowledge and skills, and clarifies things such as the instructional problems, goals, objectives, learning environment, audience type, constraints, and delivery options.
- **Design** – identifies learning objectives, assessment instruments, exercises, content, subject matter, lesson plans, media and approach for presentation of such materials.
- **Development** – creates and assembles training content assets conceptualized during the design phase, items such as storyboards, written content, presentations, graphics, e-learning, etc.
- **Implementation** – ensures stakeholders are prepared and includes the training of facilitators and/or instructors, validation of expected learning outcomes, execution of planned delivery methods, testing and continuous improvement of procedures and approaches, and utilization of available tools.
- **Evaluation** – provides opportunity for users, instructors, and other stakeholders to evaluate and comment on the training program, supporting artifacts, instructors, and approaches. Effective training measures are vital in determining if, and how much, training has supported organizational goals. This is often done using a four-level evaluation model. Successive levels build on the information provided by lower levels to measure performance by analyzing:
 1. **Reactions** – How participants reacted to the



training program. Did they like it? Was it relevant to their job function?

2. **Learning** – Assess the extent students have advanced their knowledge, skills, and attitudes towards what is being communicated in the training program.
3. **Knowledge Transfer** – Measure the change in behavior due to the training program. Are the knowledge and skills gained during the training program being used by the trainee?
4. **Results** – Measures the success of the program in terms that management and executives can understand (increased productivity, improved quality, decreased cost, etc).

The type of training approach used will vary from project-to-project. Course developers must understand how people learn and be familiar with different teaching styles, tools, and materials, as well as the organization's culture and the training's audience type. Consideration must also be made to ensure compliance with Federal regulations, policies, and standards as they relate to items such as Section 508 compliance, records management, privacy, and security. Training materials may include items such as seminars, presentations, workbooks, self-study tutorials, training instructor guides, student training materials, audio and visual aids, user manual, and computer-based and other media.

After identifying objectives and defining the most appropriate approach for training delivery (classroom, online, workshop, multi-media), decide on an appropriate duration for the training. It may be necessary to plan, develop, and execute a series of courses to achieve the training objectives. Consider what staffing and skill requirements are necessary to develop and implement the planned training curriculum. Utilize the training plan to document the requirements and how such requirements will be met. Course developers should work with system analysts, testers, and other stakeholders to develop training curriculums and associated support materials.

If necessary, outsourcing course development and training to a specialized external training developer is one possible option. However, capitalizing on domain knowledge gained throughout the project's life cycle, while leveraging associated skills and courseware development experience, often produces the best results.

For more information on planning training, the Project Management Community of Practice or the CDC UP please visit the CDC Unified Process website at <http://www.cdc.gov/cdcup/>. ■

Project Management Community of Practice

- **August 24, 2012**
Enterprise Performance Life Cycle (EPLC)
- **September 28, 2012**
A Conversation with CDC Policy Leadership
- **October 26, 2012**
The Value of Alternative Analysis
- **December 07, 2012**
Managing Risk

For more information on the Project Management Community of Practice visit the PMCoP website at <http://www2.cdc.gov/cdcup/library/pmcp/> ■

CDC Unified Process Presentations

The CDC UP offers a short overview presentation to any CDC employee and/or contractor group. Presentations are often performed at your facility, on a day of the week convenient for your group, and typically take place over lunch structured as one hour lunch-and-learn style meeting.

Contact the CDC Unified Process at cdcup@cdc.gov or visit <http://www.cdc.gov/cdcup> to arrange a short overview presentation for your group. ■

Contact the CDC Unified Process

The CDC Unified Process Project Management Newsletter is authored by Daniel Vitek, MBA, PMP and published by the Office of Surveillance, Epidemiology, and Laboratory Services.

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