

TRAINING PROJECTS TEMPLATE PACK



User Guide

Second Edition

Other Tools and Templates by Business Performance Pty Ltd:

Training Management Template Pack
Training Evaluation Toolkit
Training Tracker
Training Management Maturity Model
Organization Communication Assessment and Guide
Project Master
Project Scorecard
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.

All templates are 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 are Word and Excel 97 and later versions.

Operating system requirements are Microsoft Windows 98, Windows Me, Windows NT, Windows 2000, Windows XP or Windows Vista.

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. These templates and guides cannot be opened with Microsoft Word and Microsoft Excel for Macintosh. 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/html/project_management.html

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

Project Management Institute	www.pmi.org
International Project Management Association	www.ipma.ch
Institute of Project Management of Ireland	www.projectmanagement.ie
Australian Institute of Project Management (AIPM)	www.aipm.com.au

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 compressed 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:

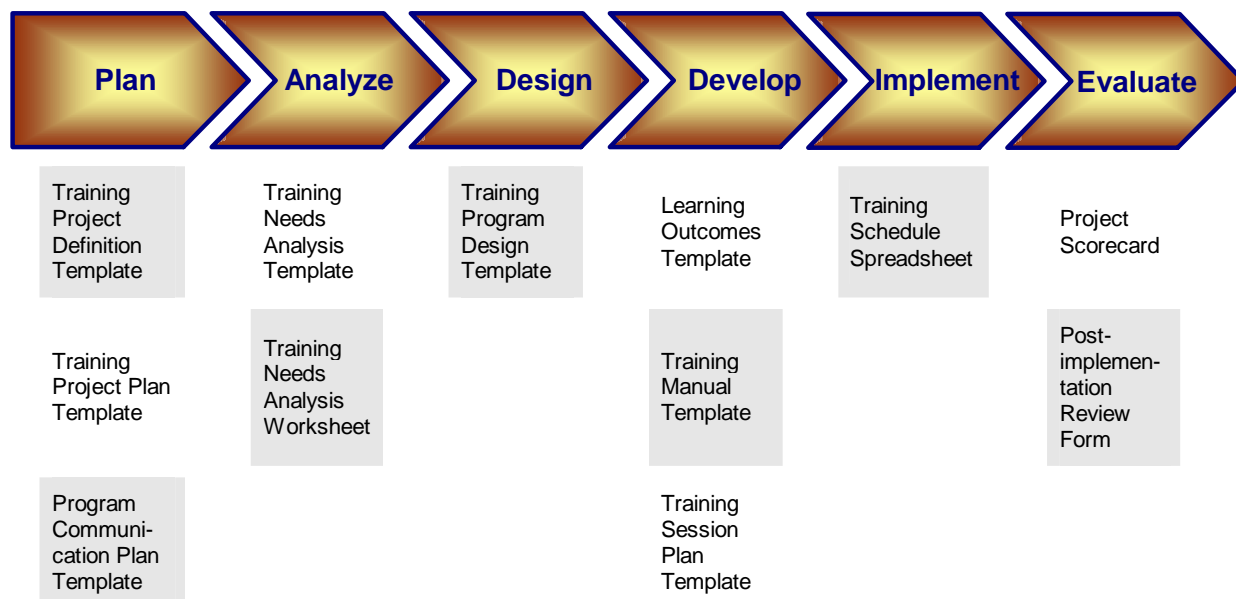
1. Go to the location that contains the *Template Pack* compressed file (e.g., A: or D:).
 2. Double click on the compressed file (`trainprojectpack.zip`).
 3. Use the instructions supplied with your decompression software to decompress the files to a directory on your hard disc (e.g., `C:\BP-TrainProjectPack`).
 4. If your computer does not recognize zip files, visit www.winzip.com or www.7-zip.org to download the zip file compressor/decompressor.
 5. Read the Quick Start Guide (`QuickStartGuide.txt`) now or read it later.
 6. To open a template or guide, either:
 - a) go to the location in which you decompressed the files and double-click on the selected file
- OR
- b) start up Microsoft Word or Microsoft Excel, select **File > Open** from the main menu bar, navigate to the location in which you decompressed the files and click the **Open** button.

4. Template Pack Summary

The pack consists of twelve 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



The table on the following pages indicate in greater detail information on each template. The format for the presentation of this information is as follows:

File description format

No.	Template/Guide Name	Comprehensive description of the template/guide and its purpose
	<i>Short description of the template/guide</i>	
	Template/Guide File Name	

5. Template Pack File Descriptions

Plan		
1.	<p>Training Project Definition Template and Guide</p> <p><i>Template for producing and documenting a project definition</i></p> <p>TrainingProjectDefinitionTemplate.doc</p> <p><i>Guide for producing and documenting a project definition</i></p> <p>TrainingProjectDefinitionGuide.doc</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>
2.	<p>Training Project Plan Template and Guide</p> <p><i>Template for producing and documenting a training program project plan</i></p> <p>TrainingProjectPlanTemplate.doc</p> <p><i>Guide for producing and documenting a training program project plan</i></p> <p>TrainingProjectPlanGuide.doc</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>
3.	<p>Program Communication Plan Template</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>ProgramCommunicationPlan.doc</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	
4.	<p>Training Needs Analysis Template and Guide</p> <p><i>Template for conducting and documenting a formal training needs analysis</i></p> <p>TrainingNeedsAnalysisTemplate.doc</p> <p><i>Guide for conducting and documenting a formal training needs analysis</i></p> <p>TrainingNeedsAnalysisGuide.doc</p>
5.	<p>Training Needs Analysis Worksheet</p> <p><i>Interview worksheet for guiding and recording training needs interviews</i></p> <p>TrainingNeedsAnalysisWorksheet.doc</p>

Design	
6.	<p>Training Program Design Template and Guide</p> <p><i>Template for producing and documenting a training program high-level design</i></p> <p>TrainingProgramDesignTemplate.doc</p> <p><i>Guide for producing and documenting a training program high-level design</i></p> <p>TrainingProgramDesignGuide.doc</p>

Develop		
7.	<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>
8.	<p>Training Manual Template</p> <p><i>Template for compiling a training program participants' manual</i></p> <p>TrainingManualTemplate.doc</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>
9.	<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>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>
Implement		
10.	<p>Training Schedule Spreadsheet</p> <p><i>Spreadsheet for managing a training course schedule</i></p> <p>TrainingScheduleSpreadsheet.xls</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>

Evaluate	
11.	<p>Project Scorecard</p> <p><i>Spreadsheet for monitoring and reporting project performance</i></p> <p>ProjectScorecard.xls</p>
12.	<p>Post-implementation Review Form</p> <p><i>Project team member questionnaire for evaluating team satisfaction</i></p> <p>Post-ImplementationReviewForm.doc</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.

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)

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)

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*.

We trust that you find these templates and guides useful in managing your training project.

6. 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

Website: www.businessperform.com

7. 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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