

How to plan training that solves the problem

Read this page once. Fill in page 2 for each training you plan.

1 Problem Statement

Problem. State the problem you are trying to solve. "They need training" is a solution, not a problem.

Root cause. The real reason it happens. Training fixes a knowledge or skill gap: people were never told the requirement, or were given incorrect direction. If they know but are not held accountable, or the tool or process makes it hard, training alone will not fix it. Set a clear policy (the rule), then write an SOP, or Standard Operating Procedure (the step-by-step way the work is done).

Desired outcome. What people will be doing differently once the problem is solved.

Success metrics. The proof it worked: something you can see or count, how often you check it, and who owns it.

2 Target Audience

Audience. Who the training is for. Example: new field technicians, front desk staff.

Prerequisites. What they need before they start: system access, equipment, or earlier training.

3 Learning Objectives

What the learner must be able to do after training. Write each one as who, the action, and the standard. Example: "New technicians will upload job photos to the project folder before leaving every site." Use action words you can see, not "understand" or "know." Aim for 3 to 5, one per task.

4 Instructional Strategy (how adults learn best)

Explain why first. Adults commit when they see how it applies to their job.

Short modules. One per objective, taken at the learner's own pace. Plain, conversational language.

Pictures and video. Pair visuals with words. Narrate visuals instead of showing walls of text. Cut anything extra.

Real job scenarios. Build on what learners already know from doing the work.

Gamification. Game elements such as points, progress, challenges, or a storyline. Research shows it boosts learning and motivation. Use it to support the content, not replace it.

Practice, spread out. A knowledge check after each module, plus a quick refresher later, beats one long session.

Build it in PowerPoint or in course authoring software. Note the total time, the devices and Wi-Fi learners need, and your SME (subject matter expert), the person who knows the job best and confirms the content is accurate.

5 Assessment and Evaluation

Knowledge checks. One real-situation question per objective. It is a check, not a test.

On-the-job evaluation. A supervisor or experienced employee watches the learner do each task and signs off once it meets the standard.

6 Verification

Verify the content is accurate, set a completion date, and review the training as often as needed.

Free next step: the SOP Template. courshub.com/free/sop-template.pdf

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TRAINING PLAN

Training title Prepared by Date

1 Problem Statement

What is the problem you are trying to solve?

Root cause ☐ Never told the requirement ☐ Given incorrect direction
☐ Not held accountable ☐ Tool or process makes it hard

Desired outcome (what will be different?)

Success metrics Measure How often Owner

2 Target Audience

Who is it for (positions) Prerequisites

3 Learning Objectives

1.
2.
3.

4 Instructional Strategy

Duration SME

Methods ☐ Short modules ☐ Video (YouTube) ☐ Photos/diagrams
☐ Real-job scenarios ☐ Gamification ☐ Refresher later

Access ☐ Phone/tablet ☐ Computer ☐ Wi-Fi

Have now ☐ Slides ☐ SOPs ☐ Photos/video

5 Assessment and Evaluation

Knowledge checks (one real-situation question per objective)

1.
2.
3.

On-the-job evaluation: observer Signed off

6 Verification

Verified by Complete by Review by