*<Project Name>*

Training strategy

*<mm/dd/yyyy>*

AGENCY:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

CONTACT:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

VERSION HISTORY

[Provide information on how the development and distribution of the Training Strategy was controlled and tracked. Use the table below to provide the version number, the author implementing the version, the date of the version, the name of the person approving the version, the date that particular version was approved, and a brief description of the reason for creating the revised version.]

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Version #** | **Implemented**  **By** | **Revision**  **Date** | **Approved**  **By** | **Approval**  **Date** | **Reason** |
| 1.0 | *<name>* | *01/8/2014* | *<name>* | *<mm/dd/yyyy>* | *Initial Plan* |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

***Note to the Author***

***This template has been provided by the Georgia Technology Authority Enterprise Portfolio Management Office. Questions should be directed to epmo@gta.ga.gov***

[This document is a template of a **Training Strategy** document for a project. The template includes instructions to the author, boilerplate text, and fields that should be replaced with the values specific to the project.

* Blue italicized text enclosed in square brackets ([text]) provides instructions to the document author, or describes the intent, assumptions and context for content included in this document.
* Blue italicized text enclosed in angle brackets (<text>) indicates a field that should be replaced with information specific to a particular project.
* Text and tables in black are provided as boilerplate examples of wording and formats that may be used or modified as appropriate to a specific project. These are offered only as suggestions to assist in developing project documents; they are not mandatory formats.

When using this template for your project document, it is recommended that you follow these steps:

1. Replace all text enclosed in angle brackets (e.g.,, <Project Name>) with the correct field values. These angle brackets appear in both the body of the document and in headers and footers. To customize fields in Microsoft Word (which display a gray background when selected):
   1. Select File, Properties, Advanced Properties. Select the Summary tab and fill in the Title field with the Document Name and the Subject field with the Project Name.
   2. Select the Custom tab and fill in the Last Modified, Status, and Version fields with the appropriate information for this document.
   3. After you click OK to close the dialog box, update the fields throughout the document with these values. Select the Home tab, Editing section, Select All (or Ctrl-A) and pressing F9. Or you can update an individual field by clicking on it and pressing F9. This must be done separately for Headers and Footers.
2. Modify boilerplate text as appropriate to the specific project.
3. To add any new sections to the document, ensure that the appropriate header and body text styles are maintained. Styles used for the Section Headings are Heading 1, Heading 2 and Heading 3. Style used for boilerplate text is Body Text.
4. To update the Table of Contents, right-click and select “Update field” and choose the option- “Update entire table”
5. Before submission of the first draft of this document, delete this “Notes to the Author” page and all instructions to the author, which appear throughout the document as blue italicized text enclosed in square brackets.[ ]

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# Purpose

The Training Strategy establishes the approach to be taken for the development and execution of training programs established for projects.

# Training Organization

*[Identify or graphically depict the training organization. This may include internal and external resources such as Training Director, Course Developer, Trainer, Training Administrator, etc.]*

# Training Program Development

*[This section outlines the instructional design approach, which will support the organizations training requirements. It is recommended the following five phases be incorporated into the organizations training strategy.]*

1. [Identify Training Requirements (who, what, when).]
2. *[Match project requirements and deliverables to training requirements.]*
3. *[Create course training material]*
4. *[Deliver Training]*
5. *Evaluate training effectiveness]*

# Training Strategy Goals

*[This section identifies the goals of the training strategy and what is to be achieved through implementing a training strategy.]*

1. *[Goal 1. Ex. Develop user knowledge, competency, and skill in the result delivered by the project.]*
2. *[Goal 2. Ex. Allow for post “go-live” training for new employees.]*

# Roles & Responsibilities

[Describe roles and responsibilities of the training staff and associated stakeholders, as it relates to the effort outlined in this training strategy.]

|  |  |
| --- | --- |
| Role | Responsibility |
| Training Director |  |
| Trainer |  |
| Course Developer |  |
| Training Administrator |  |

# Training Delivery

[Describe the various methods by which training will be delivered to the project community. Effective training programs will include the following.]

1. Train-the trainer
2. End-users

# Training Sources

[Identify the source of the training (developed in-house, contracted to external agency, commercial off the shelf (COTS), etc. If in-house development is chosen, expand upon this training strategy to include associated development activities and timeline for task completion and delivery of source materials.]

# Training Curricculum

[Identify the courses, classes, workshops, etc that are included in the scope of the training program. A course catalog should also be developed and referenced.]

|  |  |
| --- | --- |
| Course Content | Description |
| *[Course Name]* | *[Course Overview or Description]* |
|  |  |
|  |  |

# Training Schedule

[Training schedules shall be developed including the course, date of training, duration of course, and start and end times of the course.]

Appendix A: Training Strategy Approval

The undersigned acknowledge they have reviewed the *[Project Name]* **Training Strategy** and agree with the approach it presents. Changes to this **Training Strategy** will be coordinated with and approved by the undersigned or their designated representatives.

[List the individuals whose signatures are desired. Examples of such individuals are Business Steward, Implementation Manager or Project Sponsor. Add additional lines for signature as necessary. Although signatures are desired, they are not always required to move forward with the practices outlined within this document.]

|  |  |  |  |
| --- | --- | --- | --- |
| Signature: |  | Date: |  |
| Print Name: |  |  |  |
| Title: |  |  |  |
| Role: |  |  |  |

|  |  |  |  |
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| Signature: |  | Date: |  |
| Print Name: |  |  |  |
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| Role: |  |  |  |

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| Signature: |  | Date: |  |
| Print Name: |  |  |  |
| Title: |  |  |  |
| Role: |  |  |  |

APPENDIX B: REFERENCES

[Insert the name, version number, description, and physical location of any documents referenced in this document. Add rows to the table as necessary.]

The following table summarizes the documents referenced in this document.

|  |  |  |
| --- | --- | --- |
| **Document Name and Version** | **Description** | **Location** |
| *<Document Name and Version Number>* | *[Provide description of the document]* | *<URL or Network path where document is located>* |

APPENDIX C: KEY TERMS

*[Insert terms and definitions used in this document. Add rows to the table as necessary. Follow the link below to for definitions of project management terms and acronyms used in this and other documents.]*

The following table provides definitions for terms relevant to this document.

|  |  |
| --- | --- |
| **Term** | **Definition** |
| *[Insert Term]* | *[Provide definition of the term used in this document.]* |
| *[Insert Term]* | *[Provide definition of the term used in this document.]* |
| *[Insert Term]* | *[Provide definition of the term used in this document.]* |