Training evaluation plan template: four levels from result to reaction, with a filled example

A training evaluation plan decides, before the course runs, which evidence will show that it worked: the business result, the behaviour at work that moves it, the learning behind that behaviour and the reaction on the day. This kit builds the plan backwards from the result, using the four levels first described by Donald Kirkpatrick, with blank and filled sheets for a fictional course and a 60-minute meeting with the sponsor to fill them in.

60 minutes | 2–6 participants | Online and adaptable in person

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The outcome

In 60 minutes the trainer and the sponsor agree one business measure with a baseline and a target, two or three behaviours someone can see at work, the learning evidence and pass marks, and an evidence table in which every item has a due date and an owner.

Before the session

- For trainers and L&D advisers who plan one course’s evaluation with its sponsor and managers.
- Ask the sponsor for the business measure and its latest figure, or plan who takes a baseline.
- Bring the course objectives and dates. Print the chain and evidence table, or share them online.
- Send plain-text sheets a day early. Allow silent writing and written comments; cameras optional.

Included in this kit

A facilitator run of show, participant worksheets with real tables, reference tables, debrief questions, adaptation notes and a follow-up plan. Use the editable Word copy to tailor examples and prompts before delivery.

Original material by Superglue. Timings are suggestions; adjust them to your participants. This resource has not been independently evaluated.

What is inside

- Evaluation chain
- Evidence table
- Knowledge-check planner
- Follow-up record at 30, 60 and 90 days
- Filled example: evaluation chain
- Filled example: evidence table
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- Filled example: follow-up record
- Filled example: evaluation summary
- Facilitator section: run of show, reference tables, debrief and adaptations

Evaluation chain

Fill it from the top: the business result first, then the behaviours at work that move it, then the learning that makes them possible, and the reaction on the day last. Each row needs a measure, a baseline, a target with a date, a source and what you will do if the target is missed.

The four levels of reaction, learning, behaviour and results were first described by Donald Kirkpatrick in a series of journal articles from 1959 and in his 1994 book Evaluating Training Programs. The sheets and wording here are original. Kirkpatrick® is a registered mark of Kirkpatrick Partners, LLC. This kit is not affiliated with or endorsed by them.

Level	What we want to see	Measure or sign	Baseline	Target and date	Source and owner	If it is not met, we will…
Level 4: result						
Level 3: behaviour at work						
Level 3: behaviour at work						
Level 2: learning						
Level 2: learning						
Level 1: reaction						

The decision this evaluation informs:

_____

Other changes that could move the result at the same time:

_____

Evidence table

One line per thing you collect. Each line has one owner who has said yes and a due date. Use the same method for every result sample as for the baseline. Status: planned, part done, done or dropped.

#	Level	What we collect	From whom or where	Method	Due	Owner	Status
E1							
E2							
E3							
E4							
E5							
E6							
E7							
E8							
E9							
E10							
E11							
E12							

Knowledge-check planner

Write one item per objective that matters most, using a pattern from the knowledge-check patterns table. Write the correct answer and the reason before the course, and agree the pass mark.

#	Objective it checks	Pattern	Case, question and options	Correct answer and why
K1				
K2				
K3				
K4				
K5				
K6				

Pass mark, and what a learner who misses it gets:

Follow-up record at 30, 60 and 90 days

One row per learner, with a code instead of a name; use a second sheet for more than ten. After each visit, write Yes, Partly, No or Not seen for each behaviour. Write the main barrier the learner or manager named, and the support agreed with an owner and a date.

The record shows whether the course carried over to work. It is not a rating of any person and must not be used in appraisal, pay or selection.

Behaviour B1:

_____

Behaviour B2:

_____

Code	Shift	Day 30: B1	Day 30: B2	Day 60: B1	Day 60: B2	Day 90: B1	Day 90: B2	Main barrier named	Support agreed, owner and date
P01									
P02									
P03									
P04									
P05									
P06									
P07									
P08									
P09									
P10									

Filled example: evaluation chain

Fictional example. A distribution centre runs the half-day course “Handovers that hold” for its 12 shift team leaders on Thursday 12 November 2026. The trainer and the operations manager, who sponsors the course, filled in this chain on Tuesday 20 October 2026.

Decision this evaluation informs: whether to run the course for the 30 supervisors at the second site. Other changes at the same time: the incident list moves to a new system in January.

Level	What we want to see	Measure or sign	Baseline	Target and date	Source and owner	If it is not met, we will…
Level 4: result	Open issues reach the next shift	Logs in a sample of 40 that miss an open issue shown on the incident list	14 of 40 (35%) in the September 2026 sample	4 of 40 or fewer (10%) in the February 2027 sample	Quality lead, monthly, against the incident list	Read the logs that still miss an issue and ask whether the cause is skill, time or the log form
Level 3: behaviour B1	Each open issue is logged in four lines: what happened, state now, next action and owner, deadline	Five recent log entries per team leader, checked by their shift manager	Not measured before the course	Day 90: at least 9 of 12 seen doing it in full	Shift managers, at about 30, 60 and 90 days	Find the barrier first (form, time, an unclear rule) before anyone repeats the training
Level 3: behaviour B2	Spoken handover: most urgent first; the receiver reads back the actions	Two handovers watched per team leader, with three checks	Not measured before the course	Day 90: at least 9 of 12 seen doing it in full	Shift managers, on the same visits as B1	Coach at the handover itself, and check that the handover has protected time
Level 2: learning	Team leaders sort events with the three tests and write a note a partner can act on	Card sort score; partner check of three notes	None (new content)	At least 10 of 12 sort 10 or more of 12 cards correctly	Trainer, observer sheet in modules M1 and M2	Rework the module before the next group and offer a short practice at the follow-up
Level 2: learning	Team leaders apply the rules to new cases	Six-item knowledge check at the end of the course	None (new content)	At least 10 of 12 score 5 or 6	Trainer, 10 minutes at the end of the course	Reteach the weakest item at the follow-up session on 26 Nov 2026
Level 1: reaction	Team leaders know what to do differently and could take part	Three statements from the session feedback form, ticked 1 to 5	None	At least 10 of 12 tick 4 or 5 for “I know what I am expected to do differently”	Trainer, paper form in the last 5 minutes	Read the open answers and change the part they name

Filled example: evidence table

The table as it stood on Friday 12 February 2027, day 92 after the course. 9 of 12 items are done. E10 is two days overdue: the early and late shift visits are done, but the night shift visits wait for the night shift manager’s return from leave.

#	Level	What we collect	From whom or where	Method	Due	Owner	Status
E1	4	Baseline: 40 handover logs from September	Handover logs and the incident list	Count the logs that miss an open issue	Wed 30 Sep 2026	Quality lead	Done
E2	1	Three feedback statements and two open questions	All 12 team leaders	Paper form, last 5 minutes of the course	Thu 12 Nov 2026	Trainer	Done
E3	2	Card sort and note check scores	All 12 team leaders	Observer sheet in modules M1 and M2	Thu 12 Nov 2026	Trainer	Done
E4	2	Six-item knowledge check	All 12 team leaders	On paper, 10 minutes, marked with the key	Thu 12 Nov 2026	Trainer	Done
E5	3	First-use note: one real handover note in four lines	All 12 team leaders	Brought to the follow-up session	Thu 26 Nov 2026	Trainer	Done
E6	3	Day 30: behaviours B1 and B2	Each team leader and their shift manager	Five log entries, two handovers watched, 10-minute talk	Fri 11 Dec 2026	Shift managers	Done
E7	4	December sample: 40 logs	Handover logs and the incident list	Same count as E1	Fri 8 Jan 2027	Quality lead	Done
E8	3	Day 60: behaviours B1 and B2	Same as E6	Same as E6	Mon 11 Jan 2027	Shift managers	Done
E9	4	January sample: 40 logs	Handover logs and the incident list	Same count as E1	Fri 5 Feb 2027	Quality lead	Done
E10	3	Day 90: behaviours B1 and B2	Same as E6	Same as E6	Wed 10 Feb 2027	Shift managers	Part done
E11	4	February sample: 40 logs	Handover logs and the incident list	Same count as E1	Fri 5 Mar 2027	Quality lead	Planned
E12	All	One-page summary for the sponsor	Rows E1 to E11	Evaluation summary sheet, read together in 30 minutes	Fri 12 Mar 2027	Trainer	Planned

Filled example: knowledge check

The six items used in the last 10 minutes of the course, with the key. Pass mark: 5 of 6. A team leader below 5 gets a short extra practice at the follow-up session on Thursday 26 November.

#	Objective it checks	Pattern	Case, question and options	Correct answer and why
K1	O1 Sort events with the three tests	Scenario choice	At 05:10 the sensor on dock door 4 fails. The door is closed off until an engineer arrives at 09:00. Is this (a) hand over, (b) log only or (c) leave out?	(a) Hand over. Equipment is out of use and there is an open action for the next shift.
K2	O1 Sort events with the three tests	Sort	Sort four events: a pallet promised to a customer by 08:00 has not left; a spill was cleaned and the aisle reopened; the coffee machine is empty; a damaged rack upright is taped off.	Hand over: the pallet and the rack upright. Log only: the spill. Leave out: the coffee machine. All four must be right.
K3	O2 Write a four-line note	Spot the gap	Read this note: “Door 4 sensor failed 05:10. Door closed off. Engineer coming.” Which of the four lines is missing or incomplete?	The next action has no owner, and there is no deadline: who meets the engineer, and by when?
K4	O2 Write a four-line note	Write it	Rewrite the note for door 4 in four lines.	Correct when a partner can say the next action, its owner and the deadline without asking a question.
K5	O3 Give open issues most urgent first	Put in order	Put three open issues in the order you would hand them over: door 4 out of use until 09:00; the customer pallet due at 08:00; the taped-off rack upright.	Rack upright, customer pallet, door 4. Safety first, then the nearest deadline.
K6	O4 Read back before accepting	Scenario choice	You are taking over. The outgoing team leader says “door 4 is sorted”. Do you (a) accept it, (b) ask what has been done and what is still open, then read back the next action, or (c) check the door yourself later?	(b). “Sorted” is not a state or an action. The receiver asks for the missing fact and reads back the action before accepting.

Filled example: follow-up record

B1: each open issue in four lines in the log. B2: spoken handover most urgent first, with a read-back. At day 60, 9 of 12 were seen doing B1 in full and 8 of 12 doing B2. The night shift day-90 visits are still open.

Fictional example. Codes, not names: the record shows whether the course carried over to work. It is not a rating of any person and is not used in appraisal.

Code	Shift	Day 30: B1	Day 30: B2	Day 60: B1	Day 60: B2	Day 90: B1	Day 90: B2	Main barrier named	Support agreed, owner and date
TL01	Early	Yes	Yes	Yes	Yes	Yes	Yes	None named	None needed
TL02	Early	Partly	Yes	Yes	Yes	Yes	Yes	The log form has no deadline field	Quality lead added a deadline field, Tue 15 Dec
TL03	Early	Yes	Partly	Yes	Yes	Yes	Yes	The next shift arrives during the briefing	Shift manager moved the briefing 5 minutes later
TL04	Early	Yes	Yes	Yes	Partly	Yes	Yes	None named	None needed
TL05	Late	No	No	Partly	Partly	Partly	No	Handover is done standing at the dock, in noise	Handover moved to the office desk; shift manager joins two in February
TL06	Late	Yes	Partly	Yes	Yes	Yes	Yes	None named	None needed
TL07	Late	Partly	Yes	Yes	Yes	Yes	Yes	The log form has no deadline field	Same fix as TL02
TL08	Late	Yes	Yes	Yes	Yes	Yes	Partly	Receiver often arrives late	Late shift start agreed with the receiving team
TL09	Night	Yes	Yes	Yes	Yes	Not seen	Not seen	None named	None needed
TL10	Night	Partly	Partly	Partly	Partly	Not seen	Not seen	Relief cover leaves no overlap with the next shift	Ten-minute overlap added to the night rota from Mon 1 Feb
TL11	Night	Yes	Partly	Yes	Yes	Not seen	Not seen	None named	None needed
TL12	Night	No	No	No	No	Not seen	Not seen	Unsure which events count as open issues	Shift manager went through the three tests with TL12, Wed 13 Jan

Filled example: evaluation summary

The interim summary on Friday 12 February 2027. The final version follows the February log sample and goes to the sponsor on Friday 12 March 2027.

Level	Target	What we saw	Met?	What it means	Decision, owner and date
Level 4: result	4 of 40 or fewer in the February 2027 sample	September 14 of 40 (35%); December 9 of 40 (22.5%); January 6 of 40 (15%)	Not yet	Moving towards the target. The incident list moved to a new system on Mon 4 Jan, which may have changed what is counted, so not all of the fall can be credited to the course.	Wait for the February sample. Quality lead checks ten January logs against the old list by Fri 5 Mar.
Level 3: behaviour	At day 90, at least 9 of 12 seen doing B1 and B2 in full	Day 90 so far, in full: B1 7 of the 8 seen; B2 6 of 8. Night shift visits, due Wed 10 Feb, are overdue.	Not yet known	The barriers named were the log form, the rota and where the handover happens, not what people knew.	Night shift visits by Tue 16 Feb (night shift manager). Keep the deadline field and the rota overlap.
Level 2: learning	At least 10 of 12 on the card sort and on the knowledge check	Card sort: 11 of 12. Knowledge check: 10 of 12 scored 5 or 6; item K3 (spot the gap) 6 of 12 correct.	Met	People could apply the rules on the day. The deadline line was the weakest point.	Trainer adds a second spot-the-gap practice to module M2 before the next group.
Level 1: reaction	At least 10 of 12 tick 4 or 5 for “I know what I am expected to do differently”	11 of 12 ticked 4 or 5.	Met	The course was clear about what should change.	No change.

Facilitator run of show

1 Agree what the evaluation is for | 5 minutes

Name the course and its dates. Say: “We are deciding now what would show us that this course worked, so we collect the right evidence at the right time. The evaluation tests the course and the support around it. It does not grade the people who attend.” Ask the sponsor which decision the evaluation should inform, for example whether to run the course again, change it or stop it. Write it at the top of the evaluation chain.

2 Start with the business result | 10 minutes

Fill the Level 4 row first. Ask: “What should be different in the work in three to six months, and how is it counted today?” Write one measure, its baseline with a date and source, and a target with a date. Spend the last three minutes on one question: “What else could move this number at the same time?” List those changes below the chain. If no measure exists, agree who collects a baseline and when.

3 Name the behaviours at work | 12 minutes

Ask: “What would people do differently at work that would move this result?” Give two minutes of silent writing, then agree two or three behaviours that someone can see or check in the work, such as a log entry or a call. For each one, write who can see it, how (a work sample, a short observation or a conversation) and the target at day 90. Ask the managers: “What will you do in the first two weeks to make this easy?” Note their answers in the last column.

4 Choose the learning evidence | 10 minutes

For each behaviour, ask: “What must learners show in the course to be ready for this?” Choose evidence that looks like the work: a sort, a written note, a short practice. Use the knowledge-check patterns table to pick one or two patterns. Agree a pass mark and what a learner who misses it gets, which is another practice and not a penalty. Write both into the Level 2 rows.

5 Keep the reaction check short | 5 minutes

Agree two or three statements for the end of the course. Take them from the session feedback form, and include one about knowing what to do differently. Set a threshold, for example 10 of 12 tick 4 or 5. Say: “Reaction tells us whether the session worked for people on the day. It does not tell us whether the work changed.”

6 Fill the evidence table and the dates | 12 minutes

Turn every row of the chain into one or more lines of the evidence table: what is collected, from whom, by which method, the due date and one owner who has said yes. Put the follow-up visits in the diaries at about 30, 60 and 90 days after the course. Give each result sample the same method as the baseline. Mark anything you cannot collect as dropped, and say why.

7 Read back and agree the report | 6 minutes

Read back the measure and target, the behaviours, the pass marks and the next three due dates with their owners. Agree when the sponsor receives the evaluation summary and that it will say what else changed at the same time. Ask each person for one risk to the plan, aloud, in the chat or on paper, or a pass. Send the chain and the table the same day.

Reference tables

Follow-up conversation at each visit

For the learner's manager, at about 30, 60 and 90 days. Allow 10 minutes and look at real work, not opinions alone. The learner may decline any question.

Step	Ask or check
1. Ask the learner	Which part of your handover have you changed since the course? Show me one recent example.
2. Ask the learner	What made it easier or harder to hand over this way?
3. Ask the learner	What would you need to keep doing it?
4. Check B1	Look at five recent log entries. How many have all four lines?
5. Check B2	Watch two handovers. Most urgent first? An owner and a deadline for each issue? Did the receiver read back the actions?
6. Name the barrier	Which barrier sits outside the learner's control, and who can remove it?
7. Record	Write Yes, Partly, No or Not seen for B1 and B2 in the follow-up record, with the barrier and the support agreed, its owner and date.

Knowledge-check patterns

Seven patterns for a short end-of-course check. The weak items test recall; the stronger items ask learners to do what the job asks.

Pattern	What the learner does	Use it to check	Weak item	Stronger item
Scenario choice	Reads a short work case and picks the best next action from three or four options	Decisions and judgement	"What is the first step of the refund process?"	"The parcel shows as delivered, but the customer says it never came. Which of these three things do you do first?"
Spot the gap	Finds what is missing or wrong in a sample of real-looking work	Quality standards and checklists	"List the parts of a good meeting note."	"Here is a meeting note. Which of the four required parts is missing?"
Sort	Puts 6 to 12 items into two to four groups	Rules that classify things	"Define a priority 1 incident."	"Sort these eight tickets into priority 1, 2 and 3."
Put in order	Arranges steps or items in sequence	Procedures and priorities	"True or false: you isolate the machine before cleaning."	"Put these five steps of the machine clean in order."
Write it	Produces a short piece of work that someone checks against a list	Notes, replies and requests	"What should a good customer reply include?"	"Write the reply to this complaint. A partner checks it against four points."

Pattern	What the learner does	Use it to check	Weak item	Stronger item
Show it	Does the task while someone watches with a checklist	Practical and spoken skills	“Describe how you would give feedback.”	“Give feedback to a colleague in a two-minute practice. The observer ticks three points.”
Explain the choice	Gives the reason for an answer in one sentence	Telling a guess from understanding	“Which option is correct?” on its own	“Which option is correct, and which rule tells you so?”

Before you use a knowledge check

Seven checks for any quiz or knowledge check at work.

Check	What it means
One item, one objective	Each item checks one course objective. Drop an item that checks none.
Match the job	The learner decides, sorts, writes or shows, as the job asks. Recalling a definition is rarely the job.
Wrong options are real mistakes	Use errors you have seen people make. No joke options and no options that are plainly wrong.
No tricks	No double negatives, no “all of the above”, no option that is right on a technicality.
Write the key first	Write the correct answer and its reason before the course, and ask a colleague to agree with them.
Set the pass mark and what follows	State the mark before the course, and what a learner who misses it gets: another practice, not a penalty.
Read the items, not only the people	When most people miss one item, check the item and the teaching before you blame the learners.

Filled example: knowledge-check results

1 is correct and 0 is not. 10 of 12 team leaders scored 5 or 6. Item K3 was the weakest, with 6 of 12 correct: half the group missed the deadline line, so the follow-up session started with it.

Code	K1	K2	K3	K4	K5	K6	Score (of 6)	5 or 6?
TL01	1	1	1	1	1	1	6	Yes
TL02	1	1	0	1	1	1	5	Yes
TL03	1	1	1	1	1	1	6	Yes
TL04	1	1	0	1	1	1	5	Yes
TL05	1	0	0	1	1	1	4	No
TL06	1	1	1	1	1	1	6	Yes
TL07	1	1	0	1	1	1	5	Yes
TL08	1	1	1	1	0	1	5	Yes
TL09	1	1	1	1	1	1	6	Yes
TL10	0	1	0	1	1	1	4	No

Code	K1	K2	K3	K4	K5	K6	Score (of 6)	5 or 6?
TL11	1	1	1	1	1	1	6	Yes
TL12	1	1	0	1	1	1	5	Yes
Correct (of 12)	11	11	6	12	11	12		10 of 12

Filled example: result measure

The same count each month: 40 logs checked against the incident list. Target: 10% or less.

Monthly sample	Logs sampled	Logs that miss an open issue	Share	Target share	Target met?
September 2026 (baseline)	40	14	35%	10%	No
December 2026	40	9	22.5%	10%	No
January 2027	40	6	15%	10%	No
February 2027				10%	

Debrief and next steps

Questions for reflection

- Which business measure did we choose, and what else could move it while the course runs?
- Which behaviour will be hardest to see at work, and who has agreed to look for it?
- Which item in the evidence table has no owner yet, or a date nobody has put in a diary?
- If the result improves but the behaviours do not, what will we tell the sponsor?

Adapt the session

- For two people, the trainer and the sponsor, fill the chain together in 40 minutes and send the evidence table to the managers afterwards for their dates and names.
- For a 30-minute version, fill only the result row, one behaviour and its follow-up visits. Add the learning and reaction rows from the course outline after the meeting.
- Online, share one document and fill it while everyone can see it. Collect the silent writing in the chat or in the document, read each row aloud before agreeing it, and keep cameras optional.
- For quiet participants and people working in a second language, give the questions in writing before each step and accept answers on paper or in the chat. Anyone can pass.
- When no business measure exists, or the course is required by a rule, plan the behaviour row in full and use a work sample at about 30 and 90 days as the main evidence. Say plainly in the summary that no result was measured.

After the session

Send the chain and the evidence table on the same day and put every follow-up visit in the diaries. At each due date, update the status in the evidence register and the follow-up record. Before each visit, send the manager the follow-up conversation questions. When the last sample is in, fill the evaluation summary with counts as well as percentages, name what else changed at the same time, and agree one decision with the sponsor.

Questions people ask

What is a training evaluation plan?

A short agreement, made before the course runs, about what evidence will show whether it worked, who collects it and when. This plan starts from the business result the sponsor cares about, then works back to the behaviours at work, the learning in the course and the reaction on the day, so every piece of evidence has a reason to be collected.

Is this based on the Kirkpatrick model?

It uses the four levels of reaction, learning, behaviour and results first described by Donald Kirkpatrick in a series of articles from 1959 and in his 1994 book Evaluating Training Programs. The sheets, questions and wording here are original. Kirkpatrick® is a registered mark of Kirkpatrick Partners, LLC, and this kit is not affiliated with or endorsed by them.

How is this different from the training evaluation form?

The training evaluation form collects participants' reactions at the end of a session and a self-reported follow-up after two to four weeks. This plan sits above it: it decides before the course which result, behaviours and learning to check, and adds manager visits with work evidence at about 30, 60 and 90 days. Use the form for the reaction row.

Can the plan prove that the training caused the result?

Usually not on its own. Other changes can move the same number, so the summary names them. A baseline taken the same way, behaviours that link the course to the result, and a comparison with a group not yet trained make the case stronger. Report what you saw and what else changed, not a claim of cause.

How do I write a good knowledge check?

Tie each item to one course objective and ask learners to do what the job asks: choose an action in a case, spot the gap in a sample, sort, put in order, write or show. Use real mistakes as wrong options, write the key before the course and set the pass mark in advance. The knowledge-check patterns table gives seven patterns with weak and stronger items.

What is included in the free and editable files?

The open PDF has the blank evaluation chain, evidence table, knowledge-check planner and follow-up record, filled examples of these and of the evaluation summary, the follow-up conversation questions, the knowledge-check patterns and the 60-minute planning meeting. Subscribers also receive the editable Word file, an Excel workbook that counts days to each due date, scores the knowledge check, counts the follow-up visits and compares each sample with the target, and a CSV of the example evidence table.

Use and sharing

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