Training plan template

A training plan template sets out who a programme is for, what people will be able to do afterwards, and how each session, practice task and check fits together. This kit gives you a blank plan and a filled example for an eight-week programme, an objective map that links each objective to practice and evidence, a session schedule, a training calendar and a one-page plan for an individual learner. The Excel version totals the hours, checks that every objective is in the schedule and turns the schedule into a week-by-week calendar with sessions and hours per month.

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

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The outcome

In a 60-minute planning meeting the trainer and the sponsor complete a training plan in which every objective starts with an action verb, links to one practice task and one piece of evidence, and appears in at least one scheduled session, and the planned minutes stay within the hours the sponsor agreed.

Before the session

- For trainers, learning and development specialists and managers who plan a course or programme of two or more sessions for a group. For one person’s development, use the individual training plan page. If the need is not yet clear, complete a training needs analysis first.
- Bring the agreed need: who the programme is for, the problem it addresses, the time people can give, fixed dates and any required content. Invite the sponsor and one subject expert; a representative learner helps with the schedule.
- Collect what already exists, such as slides, e-learning, job aids and earlier courses. Note what people must be able to do on the job, not only what they must know.
- Open the Excel version on a shared screen if you can; it totals the minutes and counts how often each objective appears in the schedule. Otherwise, print the blank plan, the objective map and the schedule.

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

- Training plan overview
- Filled example: training plan overview
- Individual training plan
- Objective and assessment map
- Session schedule
- Training calendar
- Filled example: objective and assessment map
- Filled example: session schedule
- Filled example: training calendar
- Facilitator section: run of show, reference tables, debrief and adaptations

Training plan overview

One page per programme. Keep each answer to one or two lines; the objective map and the schedule hold the detail.

Item	Your plan
Programme title and version	
The need it addresses, in one sentence	
Who it is for, and how many people	
Starting level of the group	
Limits: hours, dates, budget, delivery mode	
Sponsor and decision owner	
Trainers and subject experts	
How we will evaluate	
Follow-up date and what we will check	
Signed off by, and date	

Filled example: training plan overview

A fictional programme for a customer support team. The objective map and the schedule for the same programme follow.

Item	Example
Programme title and version	Handling billing escalations, version 1.0
The need it addresses, in one sentence	Billing disputes are transferred to the billing team without the facts it needs, so customers wait for a second contact.
Who it is for, and how many people	12 customer support advisers in one team, all with at least three months in the role.
Starting level of the group	All advisers resolve simple billing questions. Few have used adjustments in the billing system, and escalation notes vary.
Limits: hours, dates, budget, delivery mode	Up to 6 hours per person over 8 weeks, from 6 October. Online, in shift-friendly slots. No external costs.
Sponsor and decision owner	Support team manager
Trainers and subject experts	Lead trainer; billing team lead as subject expert for sessions 2 and 4
How we will evaluate	End-of-session form for each live session; practice evidence from the objective map; work samples in week 8
Follow-up date and what we will check	Tuesday 24 November: two real escalation notes per adviser, checked by the billing team lead
Signed off by, and date	Support team manager, 29 September

Individual training plan

For one person and their manager. Use it on its own, or next to a group programme to choose what matters most for this person.

Worked example

Fictional: an adviser in the billing programme chooses O4 and O5. Goal in their words: “Explain a refusal without sounding defensive, and stop getting notes sent back.” Practice: one escalation note a week checked by a colleague. Support: 30 minutes a week in the test system. Check-ins: 23 October and 20 November.

Name, role and manager

The goal in the person’s own words

Objectives that matter most for this person

What they will practise between sessions, and when

Support they need: time, access, a colleague or the manager

Two check-in dates, and what will show progress

Objective and assessment map

One row per objective. Each objective needs a practice task close to the job and evidence that someone could check. Write the session numbers from the schedule.

Code	Objective: the learner will…	Practice task	Evidence it was met	Sessions
O1				
O2				
O3				
O4				
O5				
O6				

Session schedule

One row per session, including self-paced work and the follow-up. The Excel version adds up the minutes and compares them with the agreed hours.

#	Date	Min	Session	Objectives	Method	Trainer	Materials and bookings
S1							
S2							
S3							
S4							
S5							
S6							
S7							
S8							

Total minutes planned, and the total agreed with the sponsor

Training calendar

One row per week, from the week of the first session to the week of the last. Write the session number and its minutes on the day it runs, then add up each week. Weeks with no session are the time people have to use the skill at work.

Week	Week starting	Mon	Tue	Wed	Thu	Fri	Sat or Sun	Sessions	Minutes
1									
2									
3									
4									
5									
6									
7									
8									
9									
10									

Sessions and hours per month, and the hours agreed with the sponsor

Filled example: objective and assessment map

Five objectives for the fictional billing programme, each with practice, evidence and a session.

Code	Objective: the learner will…	Practice task	Evidence it was met	Sessions
O1	Summarise a billing dispute in three lines: the charge, the date and what the customer asks for.	Summarise three fictional tickets in pairs	Trainer checks each summary against the ticket facts	S1
O2	Choose the correct route for a dispute (resolve, adjust or escalate) with the decision guide.	Sort ten fictional cases into the three routes	8 of 10 cases routed as the guide says; the rest discussed	S1, S4
O3	Apply an adjustment or a credit note in the billing system’s test environment.	Guided practice on three test cases	Three test cases completed without errors	S2
O4	Explain a billing decision in plain language and agree a next step with the customer.	Role-play in trios with an observer sheet	Observer notes show a plain explanation and an agreed next step	S3
O5	Write an escalation note that the billing team can act on without asking a question.	Write a note for a fictional case	Billing team lead confirms the note needs no follow-up question	S4, S5

Filled example: session schedule

Five sessions over eight weeks: 345 minutes, within the agreed 6 hours per person.

#	Date	Min	Session	Objectives	Method	Trainer	Materials and bookings
S1	Tue 6 Oct	90	Find the facts in a billing dispute	O1, O2	Live online: demonstration, paired practice	Lead trainer	Six fictional tickets; decision guide
S2	Tue 13 Oct	45	Adjustments and credit notes	O3	Self-paced: guided practice in the test system	Billing team lead	Test accounts for 12 advisers
S3	Tue 20 Oct	90	Explain a decision and agree a next step	O4	Live online: role-play in trios	Lead trainer	Four role-play cases; observer sheet
S4	Tue 27 Oct	90	When to escalate, and how to hand over	O2, O5	Live online: case practice	Lead trainer and billing team lead	Escalation note template
S5	Tue 24 Nov	30	Follow-up: review real escalation notes	O5	Live online: small-group review	Billing team lead	Two anonymised notes per adviser

Filled example: training calendar

The fictional billing programme from the schedule, week by week: 8 weeks, 5 sessions and 345 minutes. October: 4 sessions, 315 minutes (5.25 hours); November: 1 session, 30 minutes (0.50 hours). Weeks 5 to 7 have no session, so advisers use the skills at work before the follow-up.

Week	Week starting	Mon	Tue	Wed	Thu	Fri	Sat or Sun	Sessions	Minutes
1	Mon 5 Oct		S1, 90 min					1	90
2	Mon 12 Oct		S2, 45 min					1	45
3	Mon 19 Oct		S3, 90 min					1	90
4	Mon 26 Oct		S4, 90 min					1	90
5	Mon 2 Nov							0	0
6	Mon 9 Nov							0	0
7	Mon 16 Nov							0	0
8	Mon 23 Nov		S5, 30 min					1	30
Total								5	345

Facilitator run of show

1 Confirm the need, the audience and the limits | 8 minutes

Read the need aloud in one sentence. Write who the programme is for, how many people, their starting level and the limits: total hours, dates, budget and delivery mode. If the sponsor cannot say which problem the training solves, stop and agree the next step for the needs analysis instead.

2 Write three to five objectives | 12 minutes

Each objective describes what a person will do after the programme, in which situation and to what standard. Start with an action verb such as summarise, choose, apply or explain. Replace “understand” and “be aware of” with something a person could show. Keep three to five; more objectives usually mean less practice for each one.

3 Map each objective to practice and evidence | 12 minutes

For each objective, write one practice task that is close to the real job, and the evidence that will show the objective was met, such as a checked task, observer notes from a role-play or a work sample after some weeks. If you cannot name the evidence, rewrite the objective.

4 Build the session schedule | 12 minutes

List the sessions in order with the date, minutes, method and the objective codes each one covers. Put practice in every session, and leave time between sessions for people to use the skill at work. Check that the total stays within the agreed hours and that every objective appears at least once. Then look at the sessions week by week on the training calendar: a crowded week or a long gap before the follow-up is easier to see there than in a list.

5 List resources, roles and risks | 8 minutes

For each session, write the trainer, the materials and anything that must be booked, such as rooms, licences or a practice environment. Name the largest risk to the programme, such as shift cover, and one action to reduce it.

6 Agree evaluation, follow-up and sign-off | 8 minutes

Agree how you will collect feedback at the end of each session, when you will check use at work, and who receives a short report. Record the version and the date of sign-off. Book the follow-up date now.

Reference tables

Objectives you can check

Rewrite objectives that describe knowing or feeling into something a person could show.

Instead of	Write	Evidence you could collect
Understand the refund policy	Choose the correct refund route for a customer case	Cases routed correctly in practice
Be aware of data protection rules	Mark the personal data in a ticket before sharing it	A marked-up practice ticket

Instead of	Write	Evidence you could collect
Know the new system	Create and submit a purchase request in the test system	A completed request in the test log
Improve communication	Explain a decision in plain language and agree a next step	Observer notes from a role-play
Be confident with complaints	Acknowledge the problem, say what you can do and agree a next step	Observer sheet with those three parts

Needs analysis, training plan or facilitator guide?

Question	Training needs analysis	Training plan	Facilitator guide
When	Before you decide to train	After the need is agreed	When one session is designed
What it answers	Is training the answer, and for whom?	What will people learn, in which sessions, and how will we know?	How exactly do we run this session?
Main output	Ranked skill gaps	Objectives, schedule and objective map	A step-by-step delivery guide
Related kit	Training needs analysis template	This template	Facilitator guide template

Debrief and next steps

Questions for reflection

- Which objective has the weakest evidence, and what would a stronger check look like?
- Where does the schedule leave time to use the skill at work between sessions?
- What would we cut first if the sponsor halved the hours?

Adapt the session

- For a single workshop, use the overview and the objective map only; the facilitator guide template covers the session itself.
- For self-paced or blended programmes, list each e-learning module as a session with its expected minutes, and add a live session for the practice that people cannot do alone.
- Plan access from the start: captions and transcripts for recordings, materials sent before sessions, practice that people can do in writing, and session times that suit shift patterns and time zones. Record these in the Method or Materials column.
- For one employee, complete the individual training plan with their manager, choose one or two objectives, and set two check-in dates.

After the session

Share the signed-off plan with the sponsor and the trainers, and store it with its version number. After each session, record attendance and feedback against the plan. At the follow-up date, compare the evidence with each objective. Before the next group starts, update the plan: remove what nobody used and add practice where the evidence was weak.

Questions people ask

What should a training plan include?

Who the training is for, the need it addresses, three to five objectives, the sessions with dates and methods, the practice and evidence for each objective, resources and roles, and how you will evaluate and follow up.

What is the difference between a training plan and a training schedule?

A schedule lists sessions and dates. A training plan also states why the training exists, what people will be able to do and how you will check it. The schedule is one part of the plan.

How do I write training objectives?

Describe what a person will do after the training, in which situation and to what standard, and start with a verb that someone could observe. The table of objectives you can check on this page shows vague objectives rewritten.

Can I use this as an employee training plan for one person?

Yes. The individual training plan page is for one employee and their manager: a goal in the person’s words, the objectives that matter most, practice between sessions, support and two check-in dates.

What does the Excel version calculate?

It adds up the planned minutes, converts them to hours and compares them with the hours agreed. It also counts how many sessions cover each objective, so an objective that no session covers shows “Not scheduled”.

Is there a training calendar template?

Yes. The training calendar page shows the programme one week per row, with each session on its day, and the Excel calendar sheets fill themselves from the schedule: sessions, minutes and hours per week and per month, and the weeks with no session. In the filled example that is October: 4 sessions, 315 minutes (5.25 hours); November: 1 session, 30 minutes (0.50 hours). It plans one programme, not a whole department’s year of courses.

What is included in the free and editable files?

The open PDF has the blank overview, objective map, schedule and training calendar, a filled example of all four, the individual training plan and the 60-minute planning meeting. Subscribers also receive the editable Word file, the Excel workbook and a CSV of the example schedule.

Use and sharing

Free to use and adapt in your own training sessions, including paid client work. Do not resell or redistribute the unmodified download as a standalone product. Share the resource page instead.