

Introduction

Purpose

In most cases, the goal of training is to solve problems, achieve goals, and resolve issues to support your organization in achieving its strategic objectives. This guide walks you step-by-step through the planning process, so that you can develop a training plan and budget that supports your organization's efforts to achieve its objectives. It comes complete with questions to ask, a running case study, and templates to fill in.

In some situations, though, training alone will not be enough to solve the problem, achieve the goal, or resolve the issue. This guide also allows you to determine whether training is the appropriate response.

How to Use These Materials

This guide consists of three parts:

- Instructions on how to perform each step
- A case study that illustrates the process
- Blank templates for your use

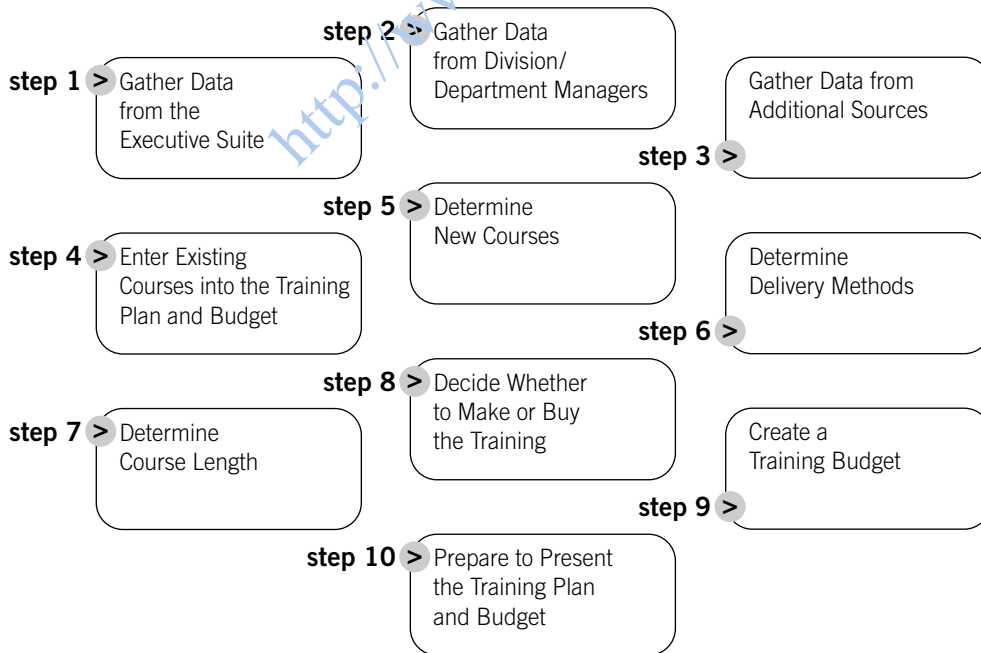
To get the most from this guide, review the example of the finished plan shown in Template 14 beginning on page 108. Then return to the beginning and read the instructions and review the intermediary examples to see the output of each step. Italicized text shows how the output of previous steps is used in the current step. With the exception of the first step where all information is new, shaded text shows new information that results from the current step.

When you are ready to create your own training plan and budget, you can photocopy the blank templates in the Appendix or print them out from the accompanying CD-ROM. Then follow the instructions to complete them.

One caveat—if you do not have the time or resources to complete each step, do what you can. Also feel free to divide the work involved among several people.

How This Book Is Organized

The flowchart in the following figure provides an overview of the process of creating a training plan and budget. A brief description of each step follows the flowchart.



Step 1: In this step, you'll meet with the executive team to learn about problems that need to be solved and goals that need to be achieved for the organization to be successful.

Step 2: In this step, you'll meet with division/department managers to learn more about the role these divisions/departments will play in solving the problems and achieving the goals that the executive team has identified. You'll also learn about any issues that each division/department is facing that are preventing it from meeting its goals.

Step 3: In this step, you'll identify existing training offered through the training department and independently within specific divisions/departments. You'll also determine whether or not training, or training alone, is the appropriate response to solving the problems, achieving the goals, and resolving the issues that have been identified.

Step 4: In this step, you'll determine which existing courses to include in this year's training plan.

Step 5: In this step, you'll determine what new courses you'll need to add to the training curriculum to solve the problems, achieve the goals, and resolve the issues that have been identified.

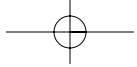
Step 6: In this step, you'll determine how new courses will be delivered. For example, should interviewing 101 be delivered in the classroom or over the company's intranet?

Step 7: In this step, you'll make an educated guess on the length of each new course.

Step 8: In this step, you'll decide whether to make or buy new courses.

Step 9: In this step, you'll cost out the training you need to buy or develop.

Step 10: In this step, you'll prepare to present the first draft of the training plan and budget to your supervisor for approval.



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