

Training that Works Checklist

“Learning is not compulsory... neither is survival.” – W. Edwards Deming

We are in a knowledge economy. Training and building a learning culture is compulsory for survival. Use this checklist to make sure you consider all the training variables. Please add to the checklist anything overlooked.

Remember, your training goals should be **S**pecific **M**easurable **A**chievable **R**ealistic and **T**imed.

Identify Company Needs/Goals /Strategy

- ☐ Adapt to change
- ☐ Build managerial and leadership skills
- ☐ Compliance and Safety
- ☐ Conflict management
- ☐ Cross-training
- ☐ Culture building
- ☐ Delegation
- ☐ Diversity and inclusion
- ☐ Effective meetings
- ☐ Ergonomics
- ☐ Fill specific skills gaps
- ☐ Financial education/open book management/budgeting
- ☐ Improve company culture
- ☐ Improve overall employee engagement and retention
- ☐ Improve sales, customer service, productivity
- ☐ Improve use of health care, 401K and other benefits
- ☐ Innovation/creativity
- ☐ Language skills
- ☐ Leadership and management
- ☐ Negotiation skills
- ☐ New hire orientation
- ☐ Policies and procedures
- ☐ Product or service knowledge
- ☐ Quality improvement
- ☐ Remote workers
- ☐ Solve a specific problem

- ☐ Support high performers with advancement opportunities
- ☐ Support strategic initiatives
- ☐ Team building
- ☐ Wellness
- ☐ Work across generations

Identifying Employee Needs

- ☐ Ai assessment
- ☐ Career development
- ☐ Coaching/mentoring
- ☐ Compliance and Safety
- ☐ Emotional intelligence
- ☐ Financial education
- ☐ How to work in teams/groups
- ☐ Increase skills
- ☐ Learning styles assessment
- ☐ Personal wellness
- ☐ Professional certifications/licensing
- ☐ Seek new opportunities
- ☐ Software utilization (Salesforce, Workday, etc.)
- ☐ Time management
- ☐ Tuition assistance

Training Methodologies and Tools

- ☐ Apps
- ☐ Best practice meetings
- ☐ Case scenarios
- ☐ Coaching
- ☐ Contests, games



Training Methodologies and Tools continued

- ☐ Conferences/events
- ☐ Continuous improvement programs
- ☐ Conversation guides
- ☐ Demonstration-individual, group, recorded
- ☐ Engagement and gamification
- ☐ Exercises
- ☐ Experimentation
- ☐ Follow-up training
- ☐ Handouts
- ☐ Job shadowing
- ☐ Just in time
- ☐ Learning management system software (LMS)
- ☐ Lecture
- ☐ Mentoring
- ☐ Lunch & learn
- ☐ Micro-learning
- ☐ Mind mapping
- ☐ Mobile accesss
- ☐ Networks
- ☐ Online through 3rd party provider
- ☐ Outside trainers
- ☐ Presentation software (PPT, Prezi, etc.)
- ☐ Role play
- ☐ Remote learning (Zoom, Teams, etc.)
- ☐ Shadowing
- ☐ Survey, micro-surveys, focus groups, interviews

- ☐ Testing
- ☐ Training manager/director
- ☐ Training room
- ☐ Use of story and metaphor
- ☐ Video, podcast, newsletter
- ☐ Virtual reality
- ☐ Webinars- live/stored
- ☐ Workshops

Learning Effectiveness

- ☐ Calculate ROI
- ☐ Collect data- costs, time, participation rates, completion rates, etc.
- ☐ Effectiveness of various incentives
- ☐ Evaluations
- ☐ Ideas submitted
- ☐ Identify benefits and results
- ☐ Identify blockages to execution
- ☐ Improved engagement and retention
- ☐ Improved sales, customer satisfaction, productivity
- ☐ Improved skills delivery
- ☐ Learning retention
- ☐ NPS (net promoter score)
- ☐ Reduced claims exposure
- ☐ Sharing of knowledge and ideas
- ☐ Stories collected
- ☐ Surveys

It would be fun to do some training and learning with you! To see the training and workshops I offer, please visit my website www.donphin.com

