



Employee Training Planner

Maximizing Budget and Effectiveness

Your CEO requests that you provide leadership training to the organization. The training needs not only to be successful, but also to integrate leadership skills into the organization's new direction and mission. What training solution do you provide? Do you engage a vendor to create some custom training? Do you purchase ready-to-implement packaged training? Or do you choose a solution in between the two?

The best choice really comes down to the specific training needs and requirements of your organization. Thinking through strategic questions and identifying your priorities are the first steps in implementing a training program that will successfully meet your organization's needs.

Training Program Basics

First, let's outline the logistics.

Participant Advice

With a large number of participants being trained over a long period of time, it can be more cost-effective to create custom training, even if it requires a large investment in the beginning. There is often a per-student cost for packaged training, as well as an annual renewal fee.

With a small number of participants, packaged training can be more cost-effective. The cost to create custom training for just a few people can be prohibitive. Balance this choice with the other training requirements, or with a combination solution of packaged training with custom small-group sessions.

Timeline Advice

Do you need training now? Will a general approach to the topic meet your needs? In other words, is it more important to get your people trained in the topic than it is to have training specific to your organization? If yes, packaged training may be your solution.

Budget Advice

As you make decisions regarding budget, don't forget your purpose and goals. If you provide a training program that meets your budget but doesn't meet your needs, you will be wasting learners' time and the organization's resources.

Training Program Name	
Number of Participants	
Roles of Employees Being Trained	
Duration of Training Program	
Deployment Method	
Budget	
Evaluation Method	
Past Lessons Learned	

✓ Qualify

Figure out if your required content is a good fit for packaged or custom training.

What topics do you want your training to involve and how unique is it to your company?

Training Topics	Number of Participants
•	•
•	•
•	•
•	•
•	•
•	•
•	•
•	•
•	•
•	•

Content Advice

Is the training needed for a general topic, like communication or time management? If so, packaged training might be a good option. As you begin your decision-making process, you'll find that there are some topics that lend themselves to packaged training, such as meeting management, customer service, and communication skills. Providing technical or software training through packaged training can also be an effective solution.

If the content is unique to your organization, department, or business goals, you may want to consider a custom training solution or modified packaged training solution. For example, if a new manager for a manufacturing company needed training on a machine unique to their company, the organization would need to create a unique training program that encompasses overall safety training, as well as content specific to the company machine.

A custom training solution starts with a needs or task analysis that identifies content requirements specific to your organization. To ensure you are selecting the best approach, take the time to understand the specific tasks that need to be trained before making the decision.

Gillespie Associates provides various packaged and custom training programs for a range of topics:

Packaged Training	Custom Training
<ul style="list-style-type: none"> • Transitioning into leadership • Clear communication • Time management • Meeting management • Giving feedback • Managing conflict • Building trusting relationships 	<ul style="list-style-type: none"> • Sales force development • Process mastery • Customer service • New hire onboarding • Product training and support • Compliance training • And everything in between!

Forecast

Set goals and objectives for your training program learning outcomes.

	Goals and Objectives	Last Year	YTD	% Change
Participants				
Assessment				
Skill Development				
Self-development				
Feedback				
Other				

Editing Advice

Updates to training can be a roadblock for some organizations. If the training frequently needs to be modified, custom training may be the better solution. This also may reduce the cost and workload long term. Ask yourself the following questions:

- How often will this information change in the next year?
Five years?
- Will the training require a redesign in the next five years?
- Will my audience's needs change at any point? Will their learning style continue to match my training style?

Measurement Advice

Once you identify what and how you will measure, your requirements should confirm if a packaged solution will meet your needs.

 **Craft**

Use the checklist to identify the brand elements needed for your training program.

- ☐ Presentation Design
- ☐ Collateral
- ☐ Resources
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

Branding Advice

If you need your materials heavily branded or specific company information integrated, confirm that a packaged solution will allow for those needs. If it is possible, that integration will add to the cost. Compare the total cost of a customized packaged solution with a custom training solution to determine which will best meet your training and branding needs at a price you can afford.

Delivery Advice

Does this training program require a specific training delivery approach? For example, your audience may require classroom training, but you're only able to find a packaged e-learning training program. Or you may need to deliver the content using a blended e-learning and classroom approach. There may be only one option for packaged training, but if the training otherwise meets all your needs, it's worth it to contact the vendor and inquire about custom delivery options.

On the other hand, because you are creating the program from scratch, custom training provides you the ability to design and deliver training exactly how your organization needs it. This gives you control over the content and delivery method. You decide if it should be e-learning, micro-learning, blended, or classroom—or something entirely different.

**Custom or standard,
Gillespie can help.**

Learn about our standardized cohort training programs and instructional design services at:

gillespieassociates.com

 **Manage**

List all of the players involved in making this training program successful.

- ☐ Training department
- ☐ Facilitator or moderator
- ☐ Instructional designers
- ☐ Subject matter experts
- ☐ Vendors
- ☐ Outside companies
- ☐ Event staff
- ☐ Printer
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

Resources Advice

If you are developing custom training, you will need to make sure that you have the financial and personnel resources to execute it. Key players include the SMEs (subject matter experts), who provide the content for the training, and instructional designers, who craft that content into an accessible format for the learner. Packaged training requires these key players as well, but those players are the responsibility of the training vendor. Depending on the format of the packaged training, however, you may need a facilitator for classroom content, a website or LMS administrator for online content, or a monitor for social forums.

Some organizations may not have a training department, or their current department is too small to manage the workload smoothly. In these situations, there are many vendors and outside companies that facilitate the training development for these organizations. Check out Gillespie's services in custom training and as an outsourced training partner.

