

# Employee Training Checklist

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This checklist is designed to help owner-managers of small businesses set up a systematic program for training their employees. The checklist is designed to provide a step-by-step approach to organize and implement a successful employee training program.

Consider each question and answer with a "yes" or "no", or "x" in light of the training needs of your particular situation.

## **Components of a Successful Employee Training Program**

Learning happens all the time whether you are aware of it or not. Learning can be *Incidental* (learning without thinking about it or meaning to) or *intentional* (learning when you engage in activities with an attitude of "what can I learn from this?") Consider integrating both of these components in your training program.

- ☐ The goals of the employee training or development program are clear
- ☐ The employee is involved in deciding on the knowledge, skills and abilities that are to be acquired
- ☐ The employee participates in activities and hands-on tasks during the learning process
- ☐ Theoretical learning includes a practical and problem-centered approach based on real examples
- ☐ The work experience and knowledge that the employee brings to each learning opportunity are used as a resource
- ☐ New material is connected to the employee's past learning opportunities and experiences
- ☐ The employee is given opportunity to reinforce what they learn by practicing
- ☐ The learning environment is informal, safe and supportive and promotes positive self-esteem

## **Determine the Goal and what the Employee Needs to Learn**

As the employer you will need to define the objective or goal to be achieved by a training program. Whether the objective is to conduct initial training, upgrade training, or to retrain for changing job assignments, the overall goal needs to be determined. For example, are you striving to accomplish:

- ☐ New skills
- ☐ New techniques for old skills
- ☐ Better workplace behaviour
- ☐ Better customer service
- ☐ Leadership skills
- ☐ Project management training

Once the goal of the program is set, you will need to determine the subject matter. The following questions are designed to help you decide what the employee needs in terms of duties, responsibilities, and attitudes.

- ☐ Can the job be broken down into steps?
- ☐ What specific skills and techniques are needed to carry out the job?
- ☐ Can the employee expect targets or goals?
- ☐ Are there hazards and safety practices which must be taught?
- ☐ Are there material handling techniques that must be taught?
- ☐ Are there performance, dress code, etiquette standards?
- ☐ Will information on your products help employees to do a better job?

## **Determine Training Delivery Method, Facility and Time**

There are numerous training delivery methods to help you prepare and equip employees to better do their jobs. The right method is based on your employee and the objective. Sometimes using several methods for each objective is the most effective way to help employees learn and retain information.

- ☐ Hands-on: on the job cross-training, demonstrations, coaching, mentorship, shadowing
- ☐ Classroom: instructor-led, seminar style
- ☐ Interaction: quizzes, group discussions, role playing

The type of training delivery method will determine the physical facilities needed.

- ☐ Do need work space or facilities for on the job training?
- ☐ Should the training be conducted off the premises, uninterrupted?
- ☐ What tools or equipment do you need?

The length of the training program will vary according to the needs of your company, the material to be learned, the ability of the instructor to teach, and the ability of the trainees to learn.

- ☐ Should the training be conducted part-time and during working hours?
- ☐ Should the sessions be held outside of working hours?
- ☐ Will the instruction last a predetermined period of time? (For example, 4 weeks, 6 weeks, or 3 months.)
- ☐ Can the length of each session and the number of sessions per week be established?

### **Choose an Instructor**

The success of training depends to a great extent on the instructor. A qualified instructor could achieve good results with limited resources. You may also want to use more than one person as an instructor.

- ☐ Are you the instructor?
- ☐ Can your supervisor or manager be the instructor?
- ☐ Have you compared third-party professional instructors?
- ☐ Is the instructor expecting compensation?

### **Determine the Program Cost**

Determine the costs of your training before starting the program so you can budget sufficient funds.

- ☐ Are the wages of trainees included?
- ☐ Is the time you and others spend in preparing and administering the program included?
- ☐ If usable output results from the sessions, should the results of training be deducted from costs of the program?

## What Checks or Controls Will You Use?

- ☐ Can you review the results of the training against the goal or objective?
- ☐ Can standards of learning time be established against the progress of the trainees?
- ☐ Can data on trainee performance be developed before, during, and after training?
- ☐ Will records be kept on the progress of each trainee?
- ☐ Will trainees be tested on the knowledge and skills acquired?
- ☐ Will the instructor provide a report on each trainee?
- ☐ Will you follow up with your employee?

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