

<b>Course Title:</b>		
<b>Trainer:</b>		<b># of Participants:</b>
<b>Location:</b>		
<b>Date:</b>		<b>Time:</b>

### Contacts

	Name	Phone
<b>Venue/client</b>		
<b>Booking coordinator</b>		
<b>Person collecting</b>		
<b>Emergency contact</b>		
<b>Technical</b> (e.g. sys admin)		
<b>Maintenance</b> (lights, air con)		
<b>Security</b> (access, after hrs)		
<b>My office</b>		
<b>Materials coordinator</b>		
<b>Helpdesk</b>		
<b>Technician</b>		
<b>Other</b>		
<b>Laptop helpdesk 1800 #</b>		
<b>Projector helpdesk 1800 #</b>		

### Preliminary preparation and contact with participants

- A set of all training documentation (e.g. Training Needs Analysis, audience analysis, training plan, training course [including objectives and outcomes], all course materials [manuals, PowerPoint slides, exercises, course outlines, handouts, feedback sheets], etc.).
- All letters, e-mails etc. checked for spelling, grammar, punctuation, content.
- All course materials checked for spelling, grammar, punctuation, content.
- Participants' names are spelled correctly on documentation, name tags/plates.
- Names on name tags must be printed large enough to be read from a distance.
- Large name tag for trainer.
- Information package sent to all participants (see next page), and a copy has been provided to you.
- Disability access requirements communicated to coordinator/venue.
- Special requirements (e.g., food) communicated to coordinator/venue.
- Brief reminder sent to participants 2 days prior to course—date, time, location.
- Course materials printed, compiled, bound. Check no pages are upside down or out of order. Count the bundles—number of participants + 1 one set for you + 2 extras, just in case. Prepare any additional slides or flip charts.
- All materials/equipment to be sent to venue have been sent.

## Participants' information pack

- Confirmation letter.
- Course description.
- Objectives.
- Pre-requisites.
- Schedule.
- Course outline.
- Date.
- Time—request arrival 15 mins prior to start time so class can begin promptly.
- Policy regarding late arrivals or 'no shows'.
- Location—public transport details; directions (mud-map) for those driving.
- Parking arrangements and likely cost.
- Lunch and other refreshment/beverage arrangements.
- Other special requirements.
- Contact information (for those with special needs that need to be taken into account [e.g., mobility, audio, visual, food]; those who need to correct the spelling of their name; and those who have other questions).

## Travel and venue

- Travel arrangements made—flights, accommodation, corporate credit card access, car rental etc. Itinerary, tickets, vouchers provided to you.
- Training room booked.
- Directions to hotel/venue.
- Client and your home office have a copy of your flight/hotel information and cell phone contact details.
- Cell phone is fully charged, and battery charger has been packed.
- Contact details of person collecting you from airport/hotel.
- Client or venue contact details in case of illness or unavoidable delay.
- Training room is available 1 hour before/after class time for setup/clean up.
- Sign-in and logon procedures for training room computers.
- Location of restrooms, phones, tea/coffee facilities—all are easily accessible and well signed; tea/coffee facilities are well-stocked; cups, utensils, kitchen area are clean and tidy; water or juice for the non-tea/coffee drinkers; milk is fresh.
- Lunch and other refreshments have been ordered/organized.
- Venue rules for food, drink, smoking.
- Fire exit and evacuation plan locations.

## Room

- Sign on door: course title and start time.
- Room size as requested.
- Arrangement suitable for viewing and interaction. Sit in all positions and check the visibility of the screen, whiteboard, flip-chart, front of the room from each.
- Sufficient chairs/tables.
- Chairs comfortable for 3+ hours.
- Tables have enough space for writing.
- Place for your equipment and materials.
- Space to get to all participants.
- Clock for synchronizing watches.
- Appropriate disability access.
- Temperature: Location of controls.
- Air flow, ventilation: Location of controls.
- Light: Adjustable? Location of switches.
- View: Can it be shut out? (curtains, blinds, shutters)
- Noises: Can they be eliminated?
- Safety hazards: Secure cords and cables on the floor with duct tape.
- Electrical outlets: Location.
- Network connections: Location.
- Whiteboard cleaned of previous material.
- Write your preferred name and the course title on the whiteboard.
- Write bullet points of introductory bio information: name, position, organization, what they expect from the training course.
- Water pitcher and glass for you.

## Materials

- Class list: names, organizations, positions, any info on participants' background and skill levels.
- Materials/equipment sent has arrived.
- Software and presentation disks/CDs.
- Extra unbound copy of all the training materials (in your carry-on luggage).
- Backup copy of software on disk/CD (in your carry-on luggage).
- Backup copy of presentation on disk/CD (in your carry-on luggage).
- Extra (advanced) exercises, reading or reference material for those who complete an exercise early.
- Place course material packages, name plates ('tents') on tables or on top of monitors.

## Equipment: General

- Whiteboard, markers, and eraser—check colors and readability.
- Projection screen available.
- Flip-chart available.
- Check the size and readability of your writing on the whiteboard/flip-chart from the back of the room.
- Cell phone: battery charged, charger available.
- Basic tools for minor repair jobs (do NOT take these items in your carry-on luggage):
  - Flathead/Phillips mini screwdriver set.
  - Scissors.
  - Letter opener/penknife to open boxes.

## Equipment: Electrical and network

- Computer projector available and working; remote control, extra batteries for remote. Check visibility when all lights are on, and from the back of the room.
- Overhead projector available and working; put up arm and check visibility.
- Spare lamps for projector(s).
- Sound: If an integral part of the presentation, consider detachable speakers (inexpensive, lightweight, better impact).
- Other AV equipment available and working: TV, VCR, DVD. Check visibility.
- Training room computers working.
- Correct software and version installed.
- Sufficient memory to run the software.
- Keyboards, mice, mouse pads: available and working.
- Printer available; networked to at least one computer.
- Login IDs/passwords available and tested.
- Internet connection active.
- Your laptop/PC:
  - Power cords.
  - Cables to connect to projector (and instructions).
  - Fully charged battery and spare.
  - Cables and connections for external keyboard, mouse, monitor.
  - Remote mouse: extra batteries.
  - Check desktop and directories for anything that could be offensive or is proprietary/confidential.
- Network cables (include at least one straight and one crossed cable).
- Electrical cords and power strips.
- Power adapters (if travelling internationally).
- Extension cords (25ft plus).
- Extra long telephone cord.
- Laser or extendable pointer (e.g., car aerial).

## other supplies

- Numerous Zip-Lock bags (various sizes): use for small items.
- Candy for distribution (fruit/carrot sticks for those who don't eat candy).
- Suitcase on wheels with pull-out handle.
- Small soft toys or stress toys; enough for whole group (hand out to participants to put on top of their monitor to attract attention if they need help; make sure you collect them at the end unless you're feeling generous).
- Tape:**
  - Masking tape.
  - Packaging tape.
  - Duct tape.
  - Scotch tape.
- Pens:**
  - Spare pens for participants.
  - Highlighters.
  - Marking pens for shipping labels.
  - Spare whiteboard markers.
- Paper:**
  - Post-it notes.
  - Spare name tags and holders.
  - Paper for participants.
  - Shipping labels.
- Other stationery:**
  - Stapler.
  - Thumbtacks.
  - Blank disks.
  - Kitchen timer.
  - Paper clips.
- First Aid items:**
  - Band-aids.
  - Aspirin.
  - Antacid tablets.
  - Cough drops.
  - Tissues.
  - Headache tablets.
  - Sewing kit.

## You

- Food and drink supplies:** Use Zip-Lock bags and insulated container.
  - Insulated coffee mug with lid.
  - Teabags/instant coffee packets.
  - Instant soup.
  - Bottled water.
  - Bagged lunch.
  - Fruit, cookies, crackers, dried fruit, trail mix, etc.
- Shoes:**
  - Clean and free of scuff marks.
  - Same color or darker than your outfit—never lighter.
- Jewelry:**
  - Understated and classy; doesn't have to be real.
  - Remove visible body piercings, except for one subtle set of earrings.
  - No dangling jewelry.
- Dress:**
  - Professional, comfortable, appropriate for the group; conservative unless you know otherwise.
  - Clean and pressed.
  - Power colors: navy blue, dark gray, and jewel tones (rich reds, purples, and greens).
  - Men: suit.
  - Women: suit or skirt and jacket.
  - Long shirt sleeves are more professional than short.
  - No tight clothes, shoes or belts.
  - Watch for loose bra straps or underwear that rides up—your discomfort will show on your face and in your movements—and it's not a good look!

## Introduction

- Arrive 30-60 minutes early.
- Turn off your cell phone.
- Put on your name tag.
- Participants' name tags ready; spelled correctly.
- Introduce yourself as participants arrive.
- Start on time.
- State your name and the name of the course.
- Housekeeping:**
  - Turn off cell phones.
  - Restrooms.
  - Public phones.
  - Beverage facilities.
  - Arrangements for breaks and for lunch; synchronize watches.
  - Fire exits, evacuation plans.
  - Special facilities for those with disabilities.
  - Rules of the room (e.g. no smoking, no food/drink).
  - Safety and ergonomic issues (e.g. top of monitor at eye level, arm and leg position, twisting to see screen).
- Introduce self – brief bio: expertise, experience, job title. Max. 30 seconds.
- Participant introductions – brief bio and reason for attending (max. 30 seconds each).
- Set rules for questions.
- List course benefits.
- Flesh out course outline and summarize the day.
- Get started!

## Conclusion

- Review objectives/outcomes achieved.
- Ask for questions—specific then general.
- Participants to complete feedback sheets; or allow them to take away and fax/mail back. Feedback should be anonymous.
- Your contact info—hand out business cards or write on whiteboard.
- Collect feedback sheets—no peeking!
- Collect name tag holders, pens, toys etc.
- Thank participants for attending.
- Remain behind for other questions.
- Tidy up room and tea/coffee area.
- Return all borrowed items, hand back security passes etc.

## Sample confirmation letter

**Note:** The content of this sample letter is fairly dry—spice it up to reflect your organization's culture. Although structured as a letter to be mailed, this confirmation letter can be easily modified to be faxed or e-mailed. In addition, all the information in the confirmation letter should be available on your organization's Web site. For an example, see the California Department of Personnel Administration: State Training Center: [http://www.dpa.ca.gov/tcid/stc/faq\\_stc.shtm](http://www.dpa.ca.gov/tcid/stc/faq_stc.shtm)

<your address block>

<their address block>

<date>

Dear <first name> <last name>

Your application to attend **<name of course>** is confirmed. This course focuses on <brief course description>. It offers plenty of hands-on practice, and encourages you to learn from one another in discussion sessions. The course will be held:

Date: **<day and date>**

Time: **<start time>** to **<finish time>**

Venue: <name of venue>

<address of venue>

We request that you are at the venue no later than <15 minutes before start time> to allow time for registration, and for us to start on time. We believe that learning should be relaxed and fun, so we suggest you dress casually (e.g., neat jeans/chinos and polo shirt—no beach wear please) and comfortably as you will be sitting for much of the <morning, afternoon, day, evening>.

In this package is further information related to this course and the venue:

- Course pre-requisites.
- Course objectives/outcomes.
- Course outline and schedule.
- Policy for "no shows" and late arrivals.
- Driving directions, parking information, public transport directions.
- Lunch and other refreshment/beverage arrangements.

Please check the spelling of your name on this letter, and let us know if we have got it wrong—your name tag will be spelt this way unless you tell us otherwise. If your name needs to be changed, if you have any special needs that we need to cater for, or if you have questions about the training course or the arrangements, please contact **<contact person>** on **<phone, fax, e-mail>**.

We look forward to seeing you on <day and date of course>.

Regards

<signature block>

### Example learning objectives/outcomes

(Based on incorporating a Condition, Action, and Standard in each objective/outcome.)

Objective/Outcome	Condition	Action	Standard
Successfully open a Word file located on the network.	Located on the network	Open a Word file	(Without errors)
Use the mouse and the keyboard to select text by character, word, and paragraph in Word. <i>(As this example has many variables, it should be broken down into much smaller tasks during the actual training)</i>	Use the mouse Use the keyboard	Select text in Word	By character By word By paragraph

### Example teaching plan

Where there are materials and preparation details in common for ALL topics, you can list them in a block at the beginning of the document, and only record the variations in the Preparation/Materials column. The Method is a summary of what you will teach and the order in which you will teach it, and the References refer to specific pages and areas of the documentation used in the course.

Topic	Outcome	Skills	Method	Preparation/Materials	References
Open file	Successfully open a Word file located on the network	<ul style="list-style-type: none"> <li>Locating a network file</li> <li>Opening a Word document</li> </ul>	<ul style="list-style-type: none"> <li>Lecture/demonstrate finding a network location</li> <li>Demonstrate different methods of opening a file (double-click, <b>File &gt; Open</b>)</li> </ul>	<ul style="list-style-type: none"> <li>PC for each person</li> <li>Microsoft Word installed on all PCs</li> <li>Mouse, keyboard</li> <li>Computer projection unit and screen</li> <li>Whiteboard and markers</li> <li>Training notes and workbooks</li> </ul>	<ul style="list-style-type: none"> <li>p10 in notes</li> <li>Ex. 3 and 4 in workbook</li> <li>"Open a document" in online help</li> </ul>
Select text	Use the mouse and the keyboard to select text by character, word, and paragraph in Word.	<ul style="list-style-type: none"> <li>Selecting text with a mouse</li> <li>Selecting text with the keyboard</li> </ul>	<ul style="list-style-type: none"> <li>Demonstrate using a mouse to select a character</li> <li>Demo mouse: select word</li> <li>Demo mouse: select paragraph</li> <li>Demo keyboard: select character...</li> </ul>	<ul style="list-style-type: none"> <li>PC for each person</li> <li>Microsoft Word installed on all PCs</li> <li>Mouse, keyboard</li> <li>Computer projection unit and screen</li> <li>Whiteboard and markers</li> <li>Training notes and workbooks</li> </ul>	<ul style="list-style-type: none"> <li>pp11-12 in notes</li> <li>Drill exercises 5-8 in workbook; repeat until mastered</li> <li>"select text" in online help</li> </ul>

## Example course outline

Time	Activity	Notes
8:30-9:00	Introduction	Housekeeping details (e.g. location of restrooms), break times, intro yourself. Participants intro themselves and give some background bio info.
9:00-9:30	About ...	Concepts, terminology, 'big picture'
9:30-10:00	Hands-on exercises and review	Don't forget to review and recap what has been learned
10:00-10:15	Break	
10:15-11:00	More about ...	Start narrowing down to the finer detail
11:00-12:00	Hands-on exercises and review	Don't forget to review and recap what has been learned
12:00-12:30	Lunch break	Yay! Food!
12:30-13:00	Even more about ...	More details...
13:00-14:00	Hands-on exercises and review	Don't forget to review and recap what has been learned
14:00-14:15	Break	
14:15-15:00	Real nitty gritty stuff now...	Yet more details...
15:00-16:00	Hands-on exercises and review	Hand out candy about now to counter the mid-afternoon sugar slump!
16:00-16:30	Wrap-up: Review, questions and feedback	Summarize the day and review what has been learned; don't forget to ask for final questions; get feedback (verbal or written).