

Learning Plan

Section 1: Organizational Analysis

State in measurable terms the answers to the following questions. What objectives does the change want to achieve? What do performers need to do to achieve these objective(s)?

Section 2: Performance Analysis

Part A: Outline what the learner needs to know, apply, and master to become proficient.

Identify competency: Competency Management

Know

Has knowledge of:

Apply

Can apply knowledge of:

Master

Can mentor/coach others in:

Part B: State the performance requirements and expectations related to this competency (knowledge, skills, attitude).

Know:

Apply:

Master:

Part C: Document influences or challenges that impact performance in this area.

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Performer Analysis

Part A. Document the individuals performing key behaviors that will be the audience for training related to this need.	
Know	
Apply	
Master	

Part B: Identify the characteristics of the audience. <i>For example, characteristics include number to be trained, specific locations, experience level, computer skills/education level, reading level, language, and attitude toward training.</i>
Part C: Document the knowledge and skill gaps for the audience below.

Section 4: Data Collection

Document the data collection strategy. For example, you can use Individual Interview, Work Observation, Group Interview, and Surveys.
Summarize the results found from data collection and analysis.

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Section 5: Evaluation Strategy

Outline the competencies (knowledge, skills, and attitudes) required to meet this business goal below .	
Level 1: How do learners feel about the training? Example: Learner satisfaction survey	
Level 2: Can learners perform the critical tasks to desired proficiency? Example: 1 hour test at the end of the instructor-led course	
Level 3 Are job productivity measures improving or is the learner performing the skills back on the job? Example: Survey managers about performance 3 months or more after training.	
Level 4 Was the business goal achieved? Example: Review updated KPI metrics to see if the goal has been reached.	

Example of a Training Matrix for Change Management

Is a change in knowledge or skills needed to execute the procedure?	Is the process or change complex? Are there multiple changes?	Criticality of process and risk of performance error? What is the difficulty in detecting errors?	What is the identified audience (e.g., location, size, department, single site vs. multiple sites)?	Is the goal to change workers' conditioned behavior (e.g., changing habits, changing routine activities)?	What kind of training is required?
No. Change(s) are editorial or content changes do not alter the intent or meaning of the procedure or process.	No. Minimal change(s) that is not complex.	No risk to product or patient. No risk posed by performance error. There is no difficulty in detecting errors.	N/A	No	No training required
Change(s) are editorial or minor. However, employee awareness and acknowledgement is required.	No. One or more minor changes that is simple and easy to understand.	No or low risk to product or patient. No or low risk posed by performance error. There is no difficulty in detecting errors.	Any audience	No	Read and Understand Pre-Job Briefing
Yes. When trainees need the opportunity to talk through change(s) and ask questions about the rationale behind the change(s).	Yes. Moderately complex change(s) that is significant enough that training requires more than read and understood, as well as provides trainees with the opportunity to talk through the change(s) and ask questions about the rationale behind the change(s).	Medium risk to product or patient. Medium risk posed by a performance error. There is minor difficulty in detecting errors.	Small, co-located groups.	Yes. There is a low or medium level of interaction with feedback. Provides opportunity for discussion between trainer and trainee.	Structured Discussion
Yes. When knowledge or skills are impacted or when new behavior or skills need to be learned or reinforced.	Yes. Moderately complex change(s) where scenarios and feedback are needed to reinforce new knowledge or skills.	Medium risk to product or patient. Medium risk posed by a performance error. There is minor difficulty in detecting errors.	Large groups that may be geographically diverse.	Yes. Simulated online activity, feedback, and assessment(s).	Computer-Based Training
Yes. The complexity of the change(s) requires face-	Yes. Moderate to highly complex change(s)	Medium or high risk to product or patient. Medium or high risk	Any size population that can be broken down into manageable	Yes. There is a high level of interaction with real-time	Instructor-Led Training

Example of a Training Matrix for Change Management

Is a change in knowledge or skills needed to execute the procedure?	Is the process or change complex? Are there multiple changes?	Criticality of process and risk of performance error? What is the difficulty in detecting errors?	What is the identified audience (e.g., location, size, department, single site vs. multiple sites)?	Is the goal to change workers' conditioned behavior (e.g., changing habits, changing routine activities)?	What kind of training is required?
to-face interaction to give trainees the opportunity to talk through changes and ask questions, while providing behavior reinforcement and the opportunity to practice new skills/behaviors in a safe setting.	that requires critical thinking to perform, while providing a safe setting to reinforce knowledge and practice new skills/behaviors.	posed by a performance error. There is a medium to high difficulty in detecting errors.	groups	responses to participants. Provides elaboration and examples, as well as a classroom assessment(s).	
Yes. When practical application in the work environment and real-time feedback is necessary to reinforce skills/behavior.	Yes. Highly complex or new skills/knowledge required, such as using specific equipment/tools or performing complex tasks. The goal is to measure the trainee's proficiency in the targeted competency.	High risk to product or patient. High risk posed by a performance error. There is a high difficulty in detecting errors.	Any size population, however it is intended to be a one-on-one training experience.	Yes. There is a high level of interaction, with real-time question and response between trainer and trainee. Provides immediate feedback and coaching, as well as a real-time competency assessment.	On-the-Job Training

Sheet 1 of 1

Activity Description _____ Briefing Leader _____

What is the Job

-
- High level description

Documentation

-
- Document inputs and outputs

Roles/Responsibilities

-
- Who does what
-
-
- Notification requirements
-
-
- Hand offs from
-
-
- Hands off to

Critical Steps

-
- Critical Steps Identified and discussed
- Product load
 - Concentration (Start/End)
 - Diafiltration (Start/End)
 - Product transfer
 - Rinse Requirements
 - In-process measurements and critical calculation requiring supervisor or lead approval
-
- Define Critical Times in the process and time off breaks are Planned
-
-
- How do you prevent errors
-
-
- Additional defenses/actions required (i.e. oversight, peer check, concurrent verification, 3-part communication)
-
-
- What are the defenses and contingencies if the worst thing happens during these steps

Error likely Situations, Consequences and mitigation

-
- What is the worst thing that can happen
- list

Human Performance Traps (as applicable)

-
- Time Pressure
-
-
- First Time Evolution
-
-
- Distractions/Interruptions
-
-
- Multiple Tasks
-
-
- Vague or Interpretative Guidance
-
-
- Overconfidence
-
-
- First Shift/Late Shift
-
-
- Peer Pressure
-
-
- Change/Off Normal
-
-
- Mental Stress/Fatigue

Operating Experience

-
- Your relevant operating experience, TRNs
-
-
- Additional actions taken to prevent similar events

Stop Work Criteria/Troubleshooting/Contact Supervisor/Lead

-
- When unexpected results, unfamiliar situations or unsafe conditions are encountered
-
-
- When inexperienced, lacking knowledge, uncertain or confused with task
-
-
- When encountering unexpected conditions within SOP or BPR
-
-
- When expected results do not occur(outside acceptance criteria)
-
-
- When someone else expresses doubts or concerns

Questions and Concerns

-
- Questions & concerns workers may have with the job