**<Project Title here>**
<date here>

The purpose of this document is to synthesize the notes you’ve taken from discussion and interviews with stakeholders and the target audience into a working training and development proposal. Using the questions on this document should help you shape the plan.

You will likely not share this document with stakeholders, but you may decide it’s helpful for your design, development or training teams. Either way, it’s for your use to gather and shape the plan. The example provided is one of working notes this professional was making as she shaped the proposal. It’s not meant to be inclusive of every question, as each project is different.

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| **Who** | * Who is the audience? What is their level, working location, demographic?
* Who is your primary stakeholder? What objective are they hoping to achieve with this program?
* Who will be designing and/or developing the training? Are you purchasing an off-the-shelf product, customizing something or building from scratch? Once you determine the “What” questions below, you may need to revisit this question.
* Who will be facilitating the sessions? Once you’ve answered the “What" questions below, revisit which of your Team members or vendors is best suited for this facilitation project. You might also consider other resources, such as leaders training their own staff. Think outside the box on who might be able to assist.

Example: Jane Smith, CFO, would like to improve the leadership skills and business acumen of her Director Team, so they can more effectively lead the expanding M&E organization and support the goals of the enterprise. A sample of Directors on her Team share feedback they have received on the quality of the presentations they bring to the Executive Team and the need to raise their perspective to a strategic one – getting their “heads out of the weeds.”M&E Director Team = 15 people; located at the Phoenix office; average tenure of the team is 7.4 years, with some serving in leadership roles for 15+ years and a couple of folks new to leadership at 1.5 years.Based on the notes below, we’ll source training from an existing program that received positive results from ABC Training Group, along with a shorter internally developed seminar. We’ll pair this approach with the 360° assessment and coaching process from the Talent Team. \*Note to talk with Juan on facilitation options.  |
| **What** | * **What must be accomplished for the project to be successful? This is the most important question you should ask.** This is the core of what you are trying to achieve. It’s uber important to get this one right, and signed-off by your stakeholder and boss before you move forward with any plans.
* What are the objectives of this class? One of the first things your team should ask of you is “What are we trying to achieve here?” What do your learners need to demonstrate as a result of attending this training? Apply design rules here to establish clear objectives for the session.

Jane stated that in general the directors in her department are performing at a manager level. Specific areas of focus are:* Being strategic versus tactical
* Building presentations geared to senior leadership and being able to present with confidence
* Demonstrating executive presence

Key objectives need to be centered on:* Demonstrating a strategic approach
* Develop and deliver a presentation that influences the audience to take action
* Understand the importance of executive presence and identify a personal branding plan

\*Note to get with Mike to clarify these objectives.\*Note to talk with Gwen in Talent on specific talent goals to reflect here |
| **When** | * When does the training need to be completed? In other words, what’s the timeline and urgency? Is there one group of employees that needs it first?  Can you stretch out the rollout to the rest of the employee population? What flexibility in timing can you gain?
* When should you get your team up-to-speed with train-the-trainers and such? This is the place to establish a timeline with milestones. Plan backwards from the implementation date to determine development due dates, pilots, train-the-trainers, etc. Be realistic as you answer this question.

Jane has set an expectation with her team that they will be presenting the department’s strategic vision and direction to the Board of Directors in October. She has shared with you that she expects marked improvement at these sessions.Tentative program start with training = March 2020 |
| **Where** | * Where does the training need to happen? Can you host it in one location? Do you need to take it to your satellite locations? Answering this one impacts many of the details in your plan, from timelines to Facilitators to budget. Build in options with this one showing the different budget implications.

The M&E Director team is located in Phoenix, AZ. All elements of the program can be hosted at the Phoenix office, and Jane has provided a resource to support logistics. |
| **Why** | * **Why is this project so important? This is the second most important question.** Establish a clear answer on why the project is important to the business.
* Why should Participants attend this class? This is where you begin to define relevancy and the “WIIFM” for Participants. This is also an important one for your Facilitators and Designers to know.

Per discussion with Jane, talent decisions will be made based on the presentation performance of the Directors at the October Board meetings, as well as improvement throughout the year. Further, the M&E department is at the heart of three of the company’s five growth initiatives. The ability to lead the organization through these strategic imperatives will be critical.Building in a tie to talent processes will be important to ensure that participants understand the purpose and support this program will provide to their performance efforts. The Talent Team may also have ideas on how to measure success specifically. |
| **How** | * How will the training be rolled out? Is face-to-face the best way to meet the objectives and purpose of the training, or can you develop an elearning or distance learning program?
* How long do you really need to address the content? Can you accomplish the objectives in 2, 4 or 6 hours? Lean on your Developers to advise you on this one. You will likely have restrictions on timing from the business, so push back if needed and possible. Don’t agree to a 2 hour session, if the topic can’t be accomplished in less than 4 hours.

Coaching, along with specific skill development, will be an important part of this plan. Connecting with the Talent Team will offer a venue for 360° assessments and executive coaching. The *Strategic Thinking* class provided to the B&E Department in 2018 would be a good fit for the tactical vs strategic mindset shift needed for this team. A separate session on executive presence would be valuable, as well.Strategic Thinking is 2.5 days, and we can tie it to an existing issue they are dealing with. Executive presence can be shorter – 2-3 hours. We’ll partner with the Talent Team on a 6-month 360° assessment and coaching package. |
| **Budget** | * Do I have a budget for the project and what is it? Is it enough? Be frugal, but realistic with what you can cover with the allotted budget.

$41,000 for a three-fold recommendation:* $25,000 – *Strategic Thinking* course
* $1,000 – internally developed Executive Presence seminar
* $10,000 – 360° assessments
* $0 – internal coaches, maybe? \*Note to reach out to Gwen on the Talent Team
* $5,000 – logistics & program fees
 |
| **Risks** | * There will be some for every project. What are they? For example, do you have the executives you need on board to support the implementation and learning transfer?
* What is the impact if we don't meet the implementation deadline?

Interviews with the Directors reflected that they aren’t as convinced for the need for development as Jane, their boss. A plan to include her in the implementation will be key, so that she can share her perspective and give them clarity as to what’s at stake for talent decisions. |
| **Communication** | * Communication is necessary for the success of any change in behavior. What change communications do you need to support your training efforts? Think organizationally and locally. What can you provide to the leaders of your participants to support retention of the content? Will engaging a member of the Communication Team help?

\*Note to talk with Gwen about the communication plan she built for the “Tailor Made” project she launched last year. Those communication tactics would likely work for this, too. |

Again, the example is illustrative of how you might use this document to synthesize a proposal using the “W” questions. Good luck!