Facilitator's Training Checklist

The best corporate trainers and facilitators have solid processes in place that make their jobs easier and allow them to focus on the task that matters most – delivering employee training. To be sure you have everything prepared and ready to go, here's a handy checklist of effective tips and techniques that will help you keep track of details and maximize the resources required to run a successful training session.

Training Program Title:		
OK	**Item**	**Notes**
	A Few Weeks Before The Training	
	Communicate directly with your on-site contact person by email or phone, if you have one.	
	Coordinate plans with co-facilitator, as needed.	
	Confirm all logistics such as meeting time, place, hotel, travel, etc.	
	Send participants initial confirmation letters and pre-course documents.	
	Order binders, nametags, certificates and other required materials.	
	Confirm that materials such as training manuals, participant guides, training toolkits, etc. will arrive as planned.	
	Make arrangements for food to be provided, if necessary.	
	Attend a Train-The-Trainer, if available, to familiarize yourself with the training program.	
	Practice your delivery of the materials, especially any areas that are particularly difficult to communicate.	
	Day Before The Training	
	Contact your co-facilitator (if you have one) to make sure they're coming and confirm logistics such as meeting time, place, hotel, travel etc. Be prepared to teach all modules if the other facilitator does not show.	
	Contact your on-site person and reconfirm logistics. Be sure to have their cell phone number in case you need to reach them before the scheduled class.	
	Check the room set up the night before the training, if	

Training Program Title:		
OK	**Item**	**Notes**
	possible, and verify that all equipment and materials are there. This is especially important if you have never been to the location before. The training site is rarely as you envisioned it.	
	Review your materials and make sure you have the latest versions of documents. Check that you have copies of the evaluation forms, as these are almost always forgotten.	
	Training Day	
	Dress appropriately for your audience. It is a good practice to dress in a manner that is slightly more professional than that of your training audience.	
	Arrive early to give yourself time to check last-minute arrangements and get yourself mentally geared up for the session.	
	Determine seating arrangements. Make sure the set-up is ideal for the training style you want to use and have some extra chairs for any last-minute trainees.	
TIP!	To encourage peer-learning and group discussion, avoid tables in rows. Instead, here are some seating ideas for easy interaction: • **Rectangular Tables:** Arrange rectangular tables in a U-shape so people may see and hear each other easily. Put some chairs on the inside of the U so that people can easily move into small groups using both sides of the tables. Or set the tables up in several squares so that people may see the instructor easily, but may also work easily in small groups. • **Circular Tables:** These tables are ideal for classroom training, since they automatically allow for small group work without people moving from their seats.	
	Adjust room temperature appropriately for the number of people who will be in the room and the size of the space you will all be occupying.	
	Check audio-visual hardware by conducting one last run-through to make sure everything is still running smoothly.	
TIP!	Make sure someone is on hand who knows how the audio-visual equipment works and ask them to demonstrate how it operates. Also, have PowerPoint slides or anything you use on overheads printed as a handout in case the equipment doesn't work. If you have computers connected to software training data bases, check to make sure you can log in easily.	
	Check electrical outlets to ensure connections are safe. Don't trail cords across walkways or overload surge protector strips.	
	Test light switches. Know which switches work which lights so you can achieve the ideal lighting for audio-	

OK	Item	Notes
	visual materials and note-taking. Make sure blinds or shades are working properly.	
	Lay out any classroom supplies. If you will be demonstrating tools or equipment, make sure you have everything you need.	
	Lay out course materials. Decide whether to put handouts on a table for trainees to pick up on the way in or to lay them at every seat.	
	Post-Training	
	Pass out certificates at end of the training.	
	Collect evaluations and post-tests.	
	Return room to original set-up.	
	Grade post-tests.	
	Equipment and Supplies *(These will vary according to your training.)*	
	Laptop computer, power cord, adapters	
	Overhead projector	
	LCD projector	
	Microphone	
	Laser pointer	
	Extension cord or power strip	
	Internet or Wi-Fi connection	
	Flipchart easels – often one per group of 5+	
	Flipchart paper	
	Evaluations	
	Markers in different colors (flipchart and/or dry erase)	
	Scissors	
	Non-permanent glue	
	3x5 cards	
	Sticky notes	
	Tape for flipchart paper/newsprint	

Training Program Title:

OK	Item	Notes
	Toys/gifts to reward participation	
	Props, flash cards, etc.	
	Door sign with session name	
	Sign-in sheets	
	Snacks	

	Things That Can Go Wrong If Not Checked *(All of these have been known to happen.)*	
	Facility doors are locked until ½ hour before the start of the training	
	Training location changes and non-one is notified	
	Too few computers are available for software training	
	Login information to access the software system for facilitator or learners is unavailable	
	Training materials that are shipped out don't arrive on time	
	Wrong manuals are sent or they're not properly prepared or printed	
	Training materials are incomplete and/or unusable	
	Too few manuals are made so trainees have to share	
	Training location is without tables, chairs, and easels	
	Additional props or resources are not ordered or don't arrive	
	No provisions are made for coffee, snacks or meals	
	Room is too big or too small, or room simply isn't suitable for training	
	Additional people show up unexpectedly	
	Trainer travels across country without checking that training had been cancelled	
	You find out at the last minute (or not at all) that the co-trainer is sick/unavailable/doesn't show up	