

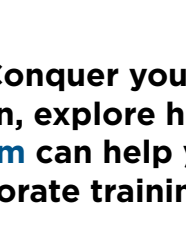


THE 6-STEP CHECKLIST

FOR CONQUERING YOUR FIRST YEAR AS A TRAINING MANAGER



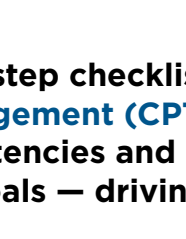
Training managers tasked with improving the business of learning face various challenges during their first year on the job, including:



Diagnosing the current state of the training function.



Assessing stakeholder needs.



Adjusting to new policies, processes and procedures.

Conquer your first year as a training manager with this six-step checklist. Then, explore how the [Certified Professional in Training Management \(CPTM™\)](#) program can help you to apply these steps, develop core competencies and manage corporate training programs that align with your company's goals — driving real business impact.

1 | DIAGNOSE

Get the lay of the land. [Diagnosing](#) establishes a baseline to measure progress against. It also helps communicate improvements to stakeholders.

Remember: You are not only a learning leader but a business leader and you must deliver training that is strategically aligned to business goals.

Diagnostics is especially important for training managers hired into an organization they have never worked for!

ASK YOURSELF

- What does the training function currently look like?
- What resources (i.e., talent, budget, technologies, subject matter expertise, vendors and systems) are currently available?
- Is there an existing learning and development (L&D) plan?
- What are the organization's short- and long-term goals?

USE ASSESSMENTS

Take a deep dive into [research](#) that offers a framework of best practices.

INVOLVE STAKEHOLDERS

Learners, their managers and executives offer insights into key business challenges and priorities and help you build rapport and trust.



LESS THAN 20%

of organizations have optimized their diagnostic processes. Learn to provide the right solutions with the [Training Needs Assessment Certificate](#) and bridge the gap between your programs and business goals.

2 | RATIONALIZE

[Portfolio rationalization](#) helps you evaluate courses to determine which ones are valuable and useful to the business and which ones are not. It also helps you determine if you are using the right resources to design, develop and deliver the training.



PREPARE FOR THE LONG HAUL

Whether you inherit 10, 100 or 1,000 courses, take the time to assess each one's strategic value and proprietary nature.



EARLY AND OFTEN

Rationalize at the start and then continuously eliminate courses that aren't driving value, freeing up resources for ones that will.

Watch this [on-demand session](#) to see how your peers use portfolio rationalization on the job.

3 | PLAN

Your L&D plan is your [go-to resource](#) outlining the relationship between training initiatives and business goals.

A solid plan [will anchor your learning programs in business goals](#) and help you achieve the most important process capability of great training organizations — [strategic alignment](#).

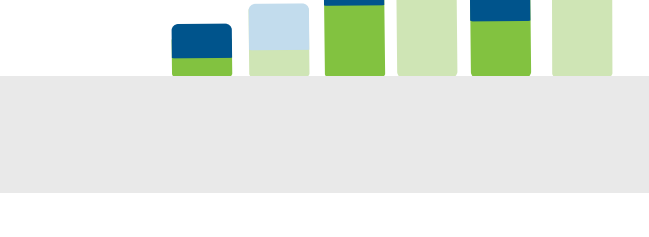
Don't be tempted to jump on every learning tech trend. Select your technologies strategically.

A SUCCESSFUL L&D PLAN INCLUDES

- Executive overview.
- Description of your learners.
- Company's business objectives.
- L&D's business needs assessment.
- Training function's current capabilities.
- L&D's short- and long-term objectives.
- Anticipated challenges and solutions to address them.

ADAPT TO THRIVE

You will likely need to add, replace or augment training initiatives at some point. [Remaining agile](#) will help ensure training continues to drive change.



4 | IMPLEMENT

ACTION!

Implementation starts with assessing and managing your resources, including subject matter experts, vendors, your existing learning tech stack and budget. From there, you can determine which courses to outsource and which to develop in house.

SELECT DELIVERY MODALITIES STRATEGICALLY

Developing a program for a large, multinational organization? eLearning or virtual instructor-led training ensures accessibility and reduces travel costs.

Developing a program for an organization whose learners are in one location? In-person instructor-led training may be your best option.

IDENTIFY KEY PERFORMANCE INDICATORS

Determining which metrics to measure upfront will help you track each course's business impact from the get-go.

Learn best practices for developing and delivering successful training initiatives to organize and optimize your training with the [Managing Training Development and Delivery Certificate](#).

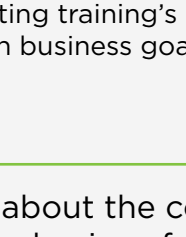
5 | COMMUNICATE

Even the most engaging and exciting new programs won't drive impact if learners don't know they exist. Make sure to communicate all available courses to learners so they know what's available.

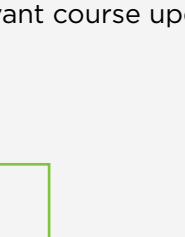
CONTINUE INVOLVING STAKEHOLDERS

Share information on all new training initiatives and on the training function's overall progress toward reaching business goals.

Marketing the business impact of training will position you — and the entire training function — as a critical business asset.



Quarterly metrics indicating training's impact on business goals.



Monthly newsletter featuring relevant course updates.

Learn about the consulting process and the basics of contracting, as well as strategies for gaining executive buy-in with the [Internal Consulting Workshop](#). Partner with your organization as an effective and credible internal consultant.



6 | REPEAT

Today's business environment is constantly changing. This checklist is a process that you should perform continuously.

After your first year as a training manager, it's time to start fresh.

LET'S GET TO WORK: YOUR YEAR 2 PLAN

- Conduct a new needs assessment to assess current organizational challenges and skills gaps.
- Update your L&D plan if needed.
- Compare against your baseline to evaluate progress.
- Implement accordingly.
- Rationalize your portfolio accordingly.
- Continue communicating progress to business leaders.

Your first year as a training manager may feel overwhelming. But don't fear: Following this checklist will position you — and your entire training organization — for success for many years to come. Below are some resources and articles to bookmark, which will help set you up for success in your new role.

YOUR NEXT STEP:

Further develop yourself as a learning professional, with the [CPTM program](#) or take the [L&D Starter Kit Journey](#). If you're unsure of which course to take, [schedule a free consultation](#) with a director of professional development.

[Is CPTM Right For Me? Quiz](#)

[Schedule a Consultation](#)

ARTICLES AND RESOURCES

ARTICLES TO READ:

- [Charting Your Path in the Training Industry: A Guide for New Professionals](#)
- [Rocking Your First 90 Days as a Training Manager](#)
- [Conquer Your First Year as a Training Manager: A Six-Step Checklist](#)
- [Building Connections in the L&D Field: Your Networking Checklist](#)

OTHER RESOURCES:

- [Training Manager Competency Model™](#)
- [Charting Your L&D Career Path On-Demand Webinar](#)
- [Discover the CPTM Advantage: Q&A With Alumni Watch On-Demand](#)
- [L&D Glossary](#)
- [L&D Wiki](#)

