

# Training Planning Checklist

**Session Title:** \_\_\_\_\_

**Program Level (circle one):**  
 Basic Intermediate Advanced

**Primary Contact:** \_\_\_\_\_

**Number of participants:** \_\_\_\_\_


*Number of offsite team members:* \_\_\_\_\_




**Budget:** \_\_\_\_\_

**Facility Name and Contact:** \_\_\_\_\_

**Presenters:** \_\_\_\_\_

- Talking points
- Slide deck
- Instructor Guide
- Other Technology
- Materials to prepare (list below)

Action Item	Delegate	Execution Date	Fee	Notes
<b>Participants</b>				
• Registration requirements*				
• Roster*  WMAS Training Attendance Sheet.do				
• Announcement/Invite* (Outlook and InSite)				
• Travel arrangement requests				
• Sign-in sheets* (use Roster document)				
• Nametags				
• Seat Assignments				
• Course Evaluation*				

 Training Course Survey.doc				
<b>Materials</b>				
<ul style="list-style-type: none"> <li>• Learning Objectives*</li> </ul>				
<ul style="list-style-type: none"> <li>• Agenda*</li> </ul>  Training Agenda Template.doc				
<ul style="list-style-type: none"> <li>• Prerequisites* (if applicable)</li> </ul>				
<ul style="list-style-type: none"> <li>• Reference materials</li> </ul>				
<ul style="list-style-type: none"> <li>• Visual Aids</li> </ul>				
<ul style="list-style-type: none"> <li>• Flip charts/easel/markers</li> </ul>				
<ul style="list-style-type: none"> <li>• Key contacts</li> </ul>				
<ul style="list-style-type: none"> <li>• CPE Certificates*</li> </ul>  Certificate of Completion.ppt				
<ul style="list-style-type: none"> <li>• Backup copies of presentation decks</li> </ul>				
<ul style="list-style-type: none"> <li>• Instructor Guide (attach softcopy)</li> </ul>				
<ul style="list-style-type: none"> <li>• Participant Workbook (attach softcopy)</li> </ul>				
<b>Facility</b>				
<i>Contact (name, address, phone, email)</i>				
<ul style="list-style-type: none"> <li>• Room Reservation</li> </ul>				
<ul style="list-style-type: none"> <li>• Set up (seating, podium)</li> </ul>				
<ul style="list-style-type: none"> <li>• Technology (wireless mic, extension cords/power strip, projector, laptop, speakers, DVD/VCR, teleconferencing)</li> </ul>				
<b>Catering</b>				
<i>Contact (name, address, phone, email)</i>				
<ul style="list-style-type: none"> <li>• Breakfast</li> </ul>				
<ul style="list-style-type: none"> <li>• Morning Snack</li> </ul>				
<ul style="list-style-type: none"> <li>• Lunch</li> </ul>				
<ul style="list-style-type: none"> <li>• Afternoon Snack</li> </ul>				
<ul style="list-style-type: none"> <li>• Dinner</li> </ul>				
<ul style="list-style-type: none"> <li>• Candy Reward</li> </ul>				

\* Denotes an AICPA and NASBA Continuing Professional Education (CPE) Standard.