PLAN WITH PURPOSE

Trainer Preparation Checklist

Prepare the learning, the logistics and yourself. Tick each item as you complete it; mark items that do not apply in your notes.

TRAINING SESSION

SESSION DATE

TRAINER / FACILITATOR

FORMAT / LOCATION

1 One week before: plan the learning

- [ ] Define what participants should be able to do after the session.
- [ ] Confirm audience roles, experience, expectations and accessibility needs.
- [ ] Finalize the agenda, including practice, discussion, breaks and buffer time.
- [ ] Prepare relevant examples, activities and questions tied to each objective.
- [ ] Choose how to check learning: a demonstration, scenario or teach-back.
- [ ] Confirm room or platform, materials, attendance and joining instructions.

2 One day before: rehearse and verify

- [ ] Review the facilitator guide, participant materials, job aids and assessments.
- [ ] Rehearse the opening, transitions and instructions; check your timing.
- [ ] Test slides, videos, audio, links and any tools used in activities.
- [ ] Prepare extra materials and a backup plan for technology problems.
- [ ] Anticipate likely questions and plan responses to difficult group situations.
- [ ] Confirm arrival details and pack supplies, adapters and required files.

PREPARATION PROMPT

What will participants practice, and how will I know they can do it?

SET UP. CHECK. FACILITATE.

Ready to Lead the Session

Use these final checks before participants arrive. For virtual delivery, complete the platform checks as well.

3 Before participants arrive

- [ ] Arrive early; confirm seating, visibility, accessibility and room comfort.
- [ ] Set out materials, name tents, activity supplies and prepared flip charts.
- [ ] Open required files and test the display, microphone, video and audio.
- [ ] Review objectives, your opening and where you can adjust the agenda.

4 Virtual training: check the platform

- [ ] Confirm the meeting link, host permissions and backup contact method.
- [ ] Test camera, microphone, internet, screen sharing and shared video audio.
- [ ] Prepare breakout rooms, polls, chat and whiteboards you plan to use.
- [ ] Send joining instructions and accessible materials; explain participation.

5 Immediately before: focus on learners

- [ ] Connect the session to a real workplace need: why should this group care?
- [ ] Know your first question, practice activity and learning check.
- [ ] Plan the next step: a job aid, action plan or follow-up for workplace use.

NOTES / OPEN ITEMS / BACKUP PLAN

Strengthen your preparation and facilitation skills.

Explore TrainSMART's Train-the-Trainer Program

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