

# Host Training Guide: Planning Your Training

All tasks listed below are to be completed by the host unless otherwise indicated.

## INITIAL PLANNING OVERVIEW

Ideally this section will be completed a minimum of 1-3 months before training.

- Begin working on training guides. Your federation will customize these based on your procedures and distribute them during training.
- Confirm budget with hosting team (hotels, travel, food, and other logistics for trainers). Host will be invoiced by each federation.
- Identify:
  - o Number of Classrooms: \_\_\_\_\_
  - o Number of Seats/Computers in each classroom \_\_\_\_\_
- Determine final training dates \_\_\_\_\_ - \_\_\_\_\_.
- Review course descriptions and pre-requisites.
- Complete list of attendees for each class. It is crucial that the pre-requisites are referenced, everyone required to attend is included, as well as excluding those that will not need to learn that functional area. Be sure to think about how you will group everyone, will it be based on their skill level, department, etc. EVERY COURSE MUST HAVE A CORE TEAM MEMBER IN ATTENDANCE TO FIELD QUESTIONS.
- Complete logistics email questionnaire (airport, preferred hotel, meals, restrictions of food in building, policies, dress code, etc.)
- The Training Manager will explain the trainer backup plan.
- Talk about and begin thinking about motivation and rewards programs with the Training Manager. Also begin designing and naming your CRM system.
- Once all necessary details have been provided, the Training Manager will draft training schedule based on above listed items and trainer availability. The Training Manager will serve as the liaison between trainers and communities.
- Approve training schedule and authorize trainers to reserve required travel (Airline, Hotel, Etc.)
- Finalize number of available seats in each course. Invite phase B teams based on remaining seats (not a part of host budget).
- The Training Manager will communicate details with phase B guests initially and then host will manage remaining communication. The Training Manager will notify guests about questions that are appropriate during training.
- Begin process at least 2 months before training:* (Optional but recommended) Create a user notebook/manual including procedures, tips and tricks, and a notes section for each user. This is recommended as a best practice. Examples can be located on Basecamp at: <https://3.basecamp.com/3346666/buckets/705549/vaults/176061735>. The JFNA team will provide advice as needed.

## PRIOR TO TRAINING

- At least 4 weeks before training:* The Host will determine which rewards if any, will be provided to motivate the students. Examples might include, prizes for participation in/completion of tasks during or after training, raffle drawings for asking certain types of questions, items placed on their desk when they arrive, etc. ideas may include promotional type of items with the federation logo, etc.
- At least 1 month before training:* The host will send a picture of the training room to the Training Manager for review of set up.

- *At least 1 month before training:* A “functional buddy” will be assigned by the host federation. This member of the host federation will be responsible for addressing questions prior to training (from each trainer as needed). The preferred “buddy” will be an expert in the functional area. There may be 1 functional buddy for the entire organization or various functional buddies for each functional area.
- *At least 1 month before training:* The host will review the “training room setup” section located below in this document to ensure they have all required equipment.
- *At least 3 weeks before training:* The host will plan snacks provided for each attendee and any other items to help the student feel appreciated during the training sessions. Additionally the host will plan/ensure meals are provided for trainers during each day of training. (Be sure to think of those with special dietary needs such as gluten or diabetic, nuts and fresh fruit (not dried) are a good example for those, however nuts can be an allergen for others, etc.)
- *At least 2 weeks before training:* The host will review all of the details of this document with the Training Manager so she may communicate all details to the trainers. Other questions will include: What training curriculum, communication, and information will the students already received by the time training occurs with JFNA team? Are there any specific gaps or points you would like the trainers to emphasize/reiterate? When did training occur and do we need to have a review of any key topics before other sessions begin?
- *At least 2 weeks before training:* Host will notify the Training Manager of any internal language such as a name for the CRM. Additionally if a logo is created for the CRM system that logo will be emailed to the Training Manager at least two weeks prior to training.
- *At least 2 weeks before training:* Host will confirm accounts for each participant in the **host staging** environment. (JFNA training database will be used in all training sessions).
- *At least 1 week before training:* Host will test the setup of their training area and resolve any issues. They will confirm the below:
  - - (1) login to CRM 4249t and verify the instance displays on the projected screen and every participant computer.
    - (2) open a PowerPoint and confirm it also displays on the screen,
    - (3) make sure the screen properly switches back and forth from PowerPoint to CRM.
    - (4) Check the screen, does it display correctly (not blurry, no long delays, right size, does the mouse follow clicks made in CRM, etc.)
    - (5) Ensure firewalls are managed for trainers to use their own computer.
- *At least 1 week before training:* The hosting federation will prepare the students. This will include: communicating with them to excite them about the training and let them know what to expect, encouraging them to have as much hands on learning as possible, creating exercises for them to complete after training, and making it possible for everyone to have a computer available during and after training. The host will request the CEO or executive sponsor provide this message as well as open the training (see below section “day of training”). Communication

suggestions from previous federations can be found here:  
<https://3.basecamp.com/3346666/buckets/705549/uploads/176501697>

- *At least 1 week before training:*
  - The final schedule will be emailed to all trainers and the hosting federation to confirm each time and reservation has been made (Training Manager).
  - Contact information for the host and trainers will also be shared a (Training Manager).
  - Any CRM names/logos, the room picture, class attendee list, login names, customizations and other details will be shared at this time (Federation).
  - Bios/profiles of trainers/go live attendees will be sent (Training Manager).
- *At least 1 week before training:* The host federation will alert security and staff members of any visitors who will be attend training, including trainers and other federation guests. Additionally, if badges are required to access restrooms or other facilities, these badges will be prepared and given to the guest upon arrival. The host will also welcome those attendees upon arrival or during the training.
- *At least 2 business days before training:* If the trainer has handouts for the participants, the trainer will either email documents to the host for production of each document or the trainer will make the required copies and include the expense on their expense report.
- *At least 2 business days before training:* The host will create and copy numerous “parking lot” tickets to allow students to write down questions they have for the core team (generally setup or process decisions).
- *At least 1 business day before training:* The host will set up the room for training to include all student stations and items listed in the “Training Room Setup” section of this document. They will test the projector, microphone, each computer in the room, and all other details in the training room referenced elsewhere in this document.

### **DAY OF TRAINING OVERVIEW**

Trainer will arrive 30-60 minutes before the course begins. Trainer will set up, speak with team hosts, and introduce themselves to the students in the room. The host will also arrive at the scheduled time and assist the trainer as needed.

The trainer will provide table tents name tags for each student as well as the login and password for the user to access the sandbox referenced above/other sandboxes used.

Trainer will provide their own laptop, however an extra host computer is necessary as a backup.

The host will help the trainer set up and show them the necessary facility rooms (bathroom, kitchen, training room etc.)

It is beneficial for the CEO or another team leader to open the training week and speak to all attendees before the sessions begin. This will allow them to introduce the training team, any visitors, and encourage the use of the system. It is critical that the person introducing the session has complete buy in to the project and encourages staff in a positive manner.

The host or assigned functional buddy will be in the room during all training sessions and will address any questions specific to their federation process or guidelines. It isn't a trainer's responsibility to manage employees who are causing distraction. The first trainer will announce at the beginning of each class that phone calls, side conversations with our neighbors, and any other distractions should be dealt with outside of the classroom. During the training a member of the host federation will manage any disturbances from the employees.

If requested by the trainer, the host will help the trainer stay on time, including intervening if a conversation goes too long or is off topic, and determining a signal they will provide to the trainer if time is running out. Please note course times are approximate and training may end early due to various contributing factors.

The host will mark attendance in each class and keep on file until 6 months after go live occurs.

### **OTHER TRAINING OPTIONS**

In the event a trainer is unable to perform the training session due to an illness, cancelled flight etc., the following will happen.

1. If there is another trainer available and time allows a last minute trainer may be assigned (with the new travel expenses paid for by the federation.)
2. If a trainer is available a live webinar will be conducted for the students.
3. If option 1 or 2 is not selected videos will be shown to the students to cover the content and a live question and answer session will be scheduled at a later time.

### **TRAINING ROOM SETUP**

Host will provide:

- Microphone
- Dry erase board or flip chart and accompanying markers
- Projector (with a double feed if there are 2 screens)
- Large Display Screen (2 if the room is large)
- Podium
- Table for trainer materials
- Paper documents as requested from each trainer (on an individual basis)
- Snacks for the students
- Reward program items
- Clock or timer
- Table tents/other item with student name, login, and password
- Close access to outlet for trainer laptop, and appropriate cords needed
- Back up Laptop for trainer (in the event the trainer's computer does not connect)

Not required, but nice to have:

- 1 pencil or pen at each student desk (and any other items the host plans to provide)
- BBEC manuals or help guides (see above for additional details)
- Water for the trainer (Bottle or cup, etc.)
- Wired connection for the trainer's laptop (instead of wireless internet)
- Small conference room for trainers to make calls if needed
- Presentation Laser pointer/Slide advance remote

## **AFTER THE TRAINING**

- The Training Manager will speak with host to learn about what can be improved in future training sessions.
- The trainers will also provide feedback to improve future training sessions.
- The host will upload any new documents on their internal site or provide paper copies.
- The host may choose to survey their team about the entire training process and share constructive feedback with the Training Manager as well as take new steps to correct current issues.
- The Training Manager will contact the federation to discuss pay it forward/back opportunities.

If you have any questions or would like to request an exception please contact  
[training.manager@jewishfederations.org](mailto:training.manager@jewishfederations.org) or at 720-477-0045.



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