

# Effective Training Process

Safety and health (S&H) training is a useful tool to improve employee safety skills and knowledge. It not only helps prevent work-related injuries and illnesses, but may reduce off-duty risks and makes your home, family, and community safer. S&H training helps communicate information and develop a positive safety culture too, which impacts the safety management system.

An effective training process ensures you adequately plan training resources (e.g., budgets, training needs, trainers), meet regulatory requirements, protect employees, and improve training through evaluation and feedback. Follow the steps in this one pager to implement an effective training process at your organization.

## Seven Steps to an Effective Training Process

- 1. ESTABLISH** written plans setting the requirements for S&H training at your organization. These plans determine how you assess training, update your training matrix, list specific instructor requirements, conduct evaluations, capture employee participation, and identify new training needs or requirements.
- 2. ASSESS** the training needs for all levels of employees. Analyze organizational knowledge, skills, and areas of improvement, as well as regulatory requirements. For example—do your employees need detailed lockout/tagout training or basic energy control awareness training? Are there administrative employees needing personal protective equipment training? Historical documents (e.g., baseline surveys, hazard analyses, inspections) can help you identify training needs based on workplace hazards or hazardous jobs employees perform.
- 3. PLAN** and schedule training by means of a training schedule. Include extra sessions, if needed, for make-up training. Determine training frequency on regulatory requirements, certification requirements, Service or Agency guidance, or local instructions. Think about your process to schedule, administer, and track required training.



Figure 1. Image created by the Department of Defense (DoD) Safety Management Center of Excellence (SMCX).

4. **DEVELOP** training content and materials. Structure training objectives and content on regulatory requirements. Refer to your training needs assessment to ensure you include the knowledge, skills, or expertise needs unique to your worksite. Tailor training as it applies to an employee's specific job or job series. Make training more effective by accommodating learning styles beyond lectures and slides (e.g., videos, activities, handouts). Consider identifying third party resources (e.g., online programs, software) to provide training if you do not have the internal resources to support your S&H training program.
5. **CONDUCT** informative, interesting, and relevant training. Assign qualified instructors for training sessions and deliver training using a variety of delivery methods to accommodate the differing learning styles of your employees. Maintain copies of trainer qualifications to verify an employee is qualified to create or deliver the course content.



Figure 2. Image courtesy of DoD SMCX

6. **RECORD** the completion and attendance for each training session. Ensure all employees complete required trainings. Utilize attendance rosters or your electronic training tracking system and maintain copies of completion certificates.
7. **EVALUATE** the effectiveness, comprehension, and retention of the training session by using pre- and post-training tests or quizzes, on-the-job evaluations, or classroom demonstrations. Consider requesting employee feedback and critiques on instructors and training content. Use evaluations and critiques to update or modify the training. Additionally, review content periodically to ensure it is up-to-date. These evaluations are a key part of continuous improvement.

**Review regulatory requirements and determine if a specific type of evaluation is required after training**  
**(e.g., forklift training must include operator observations)**

An effective training process tracks training from beginning to end—from developing written plans, to evaluating your training, and then updating your program. Review your S&H training program at least annually to ensure all components still apply to your organization, determine if you need further training, and ensure training materials remain current.

For additional information on the SMCX's services, please visit the SMCX-hosted website at: <https://www.smcx.org/>.