



Corporate Training Brief Template

For HR Teams

**A Practical Planning
Template for HR & L&D
Teams**

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1. Why a Training Brief Matters

Many corporate training workshops begin with a simple request such as "We need communication training" or "We need leadership development." While these topics provide a starting point, they rarely give a corporate trainer enough information to design a workshop that addresses the organisation's actual needs.

A well-prepared training brief provides valuable context before the workshop is designed. It helps the trainer understand the business challenges, participant profile, workplace situations, and expected outcomes. This enables the training to include relevant examples, practical discussions, and activities that reflect the participants' day-to-day work.

Spending time on a structured training brief before the workshop often leads to better participant engagement, more relevant discussions, and stronger workplace application after the training.

2. Organisation Information

Information	Details
Company Name	_____
Industry	_____
Department / Business Unit	_____
Location	_____
Number of Participants	_____
Participant Experience Level	<input type="checkbox"/> Entry Level <input type="checkbox"/> Junior <input type="checkbox"/> Mid-Level <input type="checkbox"/> Senior <input type="checkbox"/> Leadership
Proposed Training Date	_____
Duration	_____
Mode	<input type="checkbox"/> Online <input type="checkbox"/> Offline <input type="checkbox"/> Hybrid
Primary Contact Person	_____
Contact Email	_____
Contact Number	_____

Additional Notes

3. Business Challenge

Clearly defining the business challenge helps ensure the training focuses on solving the right problem rather than simply covering a topic.

What business problem are you trying to solve?

What is happening today?

Why is this becoming a challenge?

What impact is this having on the organisation, customers, or team?

Is this challenge affecting specific departments or the entire organisation?

4. Training Objectives

Define what success should look like after the workshop.

After the training, what should participants know?

What should participants be able to do differently?

Which workplace behaviours should improve?

Are there any specific organisational goals this training should support?

5. Participant Profile

Understanding the participants helps the trainer customise examples, discussions, and activities appropriately.

Participant Information	Details
Current Skill Level	_____
Typical Roles	_____
Average Years of Experience	_____
Previous Training Attended	_____
Biggest Learning Gaps	_____
Common Workplace Challenges	_____
Manager Expectations	_____
Any Special Learning Requirements	_____

Additional Participant Notes

6. Practical Workplace Scenarios

The most effective workshops are built around situations participants actually experience at work. Sharing real examples helps the trainer customise activities, discussions, role plays, and case studies.

Describe common workplace situations participants face.

Difficult conversations participants regularly handle

Customer or client interactions

Team collaboration or communication challenges

Leadership or management situations

Other scenarios that should be included in the workshop

7. Success Measures

Define how improvement will be evaluated after the training.

Area	Before Training	After Training	How Success Will Be Measured
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Communication			
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Leadership			
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Sales			
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Customer Service			
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AI Adoption			
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Microsoft Excel			
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Power BI			
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Productivity			
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Additional Success Measures

8. Questions for the Corporate Trainer

Use these questions during trainer discussions or proposal evaluations.

- How will this workshop be customised for our organisation?
- How will you understand our business challenges before the training?
- How will participant engagement be maintained throughout the session?
- What practical exercises or activities will participants complete?
- Will real workplace scenarios be incorporated into the workshop?
- How do you ensure participants can apply the learning after the session?
- How do you adapt your delivery for different experience levels?
- How do you measure participant learning during the workshop?
- What recommendations do you provide after the training?
- Is any post-training support or follow-up available?

Additional Questions

9. Final Training Planning Checklist

Tick each item before confirming the workshop.

Checklist	Completed
Training objectives clearly defined	<input type="checkbox"/>
Business challenge identified	<input type="checkbox"/>
Expected workplace behaviours documented	<input type="checkbox"/>
Participant list confirmed	<input type="checkbox"/>
Participant experience level identified	<input type="checkbox"/>
Managers informed and aligned	<input type="checkbox"/>
Real workplace scenarios collected	<input type="checkbox"/>
Success measures agreed	<input type="checkbox"/>
Training format confirmed	<input type="checkbox"/>
Training date approved	<input type="checkbox"/>
Venue or online platform arranged	<input type="checkbox"/>
Required equipment confirmed	<input type="checkbox"/>
Participant communication sent	<input type="checkbox"/>
Trainer brief shared	<input type="checkbox"/>
Presentation and materials confirmed	<input type="checkbox"/>
Attendance process planned	<input type="checkbox"/>
Feedback collection method prepared	<input type="checkbox"/>
Post-training action plan discussed	<input type="checkbox"/>
Follow-up review date scheduled	<input type="checkbox"/>
Final approvals completed	<input type="checkbox"/>

The Way Forward

Use this document as a planning guide before engaging an external corporate trainer or designing an internal learning program. Completing each section helps ensure the training is aligned with business needs, participant expectations, and measurable workplace outcomes.

Corporate training becomes truly effective when it addresses **real workplace challenges**.

A simple training needs analysis helps ensure that:

- The right problem is addressed
- The right employees attend
- The training creates practical behaviour change

If you would like support in designing a **customized workshop for your team**, feel free to reach out.


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To plan a workshop for your team:

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