



# TRAINING CHECKLISTS FOR CAD MANAGERS

Conducting training can be overwhelming. Whether you're an experienced trainer or new to the process, it's easy to overlook details that you need to succeed. With a little guidance from CAD management expert, Robert Green, you can be sure you're ready.



## Know Your Purpose

Training should ultimately save your company money, by increasing user expertise and operational efficiency. If your training doesn't address at least one of the following, reexamine your goals.

- Teach and reinforce standards.
- Change to new software tools and/or workflows.
- Solve repeated problems and prevent user errors.
- Help more users in less time than you can by addressing issues one-on-one.
- Build a library of training resources users can refer to whenever needed.



## Build Your Lesson

- Create a rough script from a list of bullet items combined with a demonstration file.
- Talk through the script.
- Repeat and refine until everything flows smoothly.
- Record the screen and narration of your final trial run to help with making handouts, practicing timing, and honing your public speaking skills.
- Create simple handouts ("cheat sheets") with lots of screen captures and minimal wording.
- Proofread, adjust, and finalize.
- If it's more comfortable for you, try talking it through first, then writing the script.



## Get Ready for Remote Training

- Test everything, including dial-in numbers and sound quality, prior to the training.
- Use the built-in recording capabilities in your remote training platform.
- As insurance in case of failure, make a redundant recording directly on your machine.
- Remember that viewers can't see you, so be more detailed in your spoken instructions and speak more slowly than you normally would.



## Engage Your Audience

There's no point to a training if your users sleep through it — or your boss thinks it's a waste of time.

- Incorporate visual aids, contextual examples, and screen shots.
- Keep it short, limiting yourself to 10 minutes per topic area, with a maximum session length of 90 minutes.
- Go for quick fixes first, addressing common problems that apply to everyone; work up to more complicated topics after you've perfected your approach.
- Build an ongoing three-month training schedule, advertise it, and send out reminders via e-mail.



## Prepare for In-Person Training

Secure everything you'll need well before your session:

- A conference room with doors/blinds that close and easy-to-control lighting.
- A large, easy-to-see flat-screen display, or projector/screen combination. Test all hardware and connections ahead of time.
- Handouts and "cheat sheets" for every participant.
- Attendance tracking sheet for all trainees to sign.



## Configure the Must-Have Machine

Whether you're training locally or remotely, be sure to:

- Install all applications and sample files you'll need.
- Properly configure all network drives and peripherals.
- Disable e-mail notifications and messaging applications.
- Set all icons/ribbon elements to large size.
- Enable mouse trails.
- Configure recording apps and hardware to capture your screen and narration while you teach.

For more Pro Tips and other free resources, visit the **Cadalyt Library**