

SAMPLE TRAINING PLAN

Education at Work: Protech Training Plan

Student: _____

Date: _____

Rating Scale

1 = Not Applicable

2 = Exposed to Task

3 = Performs Task with Assistance

4 = Mastered Task

DEPARTMENT / POSITION:
Special Services / Operations Clerk

5 = Can Demonstrate Task to Others

I. Department Procedures	1	2	3	4	5
<i>A. Tasks</i>					
1. Researches \$50-and-under overdraft/charge-offs for other account relationships.					
2. Data entry on MSAccess.					
3. Responds to inquiries by customers and branches, performing research when necessary.					
4. Performs follow-up with branch staff and/or customers, as appropriate.					
5. Has direct contact with vendors to give and receive updated information.					
6. Assists in the preparation and filing of branch administration reports.					
7. Types letters, memos, and other documentation by using MSWord.					
8. Provides telephone coverage.					
9. Handles incoming and outgoing mail.					
10. Keeps department filing current.					
11. Produces letters to branches regarding customer overdraft.					
12. Other duties as assigned:					
<i>B. Systems / Equipment Proficiency</i>					
1. Uses computer to perform daily functions.					
2. Accurately uses 10-key adding machine.					
3. Efficiently operates telephone systems.					
4. Uses fax machine.					
5. Operates copying machine.					
<i>C. Terminology / Conceptual Understanding of Department</i>					
1. Develops a working knowledge of the branch. Supports department and all aspects of branch operations.					
2. Understands department filing system.					

Rating Scale
 ES = Exceeds Standard
 MS = Meets Standard
 BS = Below Standard
 N/A = Not Applicable

II. Principles	ES	MS	BS	N/A
<i>A. Understanding of Organization</i>				
1. Describes functions of the department's work.				
2. Explains how department relates with other departments.				
3. Understands the purpose of major departmental procedures.				
4. Other:				
<i>B. Safety and Security</i>				
1. Adheres to company safety and security regulations.				
<i>C. Skills (where applicable)</i>				
1. Understands and demonstrates basic knowledge of banking, insurance, and investments:				
<input type="checkbox"/> Computation skills				
<input type="checkbox"/> Reading skills				
<input type="checkbox"/> Telephone skills				
<input type="checkbox"/> Keyboard/computer skills				
<input type="checkbox"/> Filing skills				
<input type="checkbox"/> Office machines				
<input type="checkbox"/> Verbal and written communication				
a. Writes clearly, concisely, and accurately				
b. Listens actively; understands directions				
c. Asks questions to learn, to solve problems, and to clarify				
<i>D. Other / Miscellaneous</i>				
1. Understands departmental terminology.				
2. Other:				

III. Excellence	Meets Standard	Below Standard
<i>A. Ethics</i>		
1. Demonstrates honesty and reliability.		
2. Maintains integrity in reporting time and filling out time sheets.		
<i>B. Behavior / Quality of Work</i>		
1. Shows a commitment to accuracy in work.		
2. Demonstrates an ability to work independently.		
3. Takes initiative when appropriate.		
4. Quantity of work.		
5. Completes / produces work in a timely manner.		
<i>C. Professionalism</i>		
1. Adheres to schedule and discusses changes with supervisor.		
2. Arrives on time; takes appropriate time for lunch.		
3. Informs supervisor if late or absent.		
4. Adheres to professional dress code.		
5. Wears / carries I.D. badges at all times (if applicable).		
6. Does not receive personal phone calls except in an emergency.		
7. Maintains confidentiality.		
8. Demonstrates respect for authority.		
<i>D. Teamwork</i>		
1. Interacts with others in a professional manner.		
2. Cooperates with others to complete team goals.		
3. Communicates effectively with clients, supervisors, and coworkers.		
<i>E. Other:</i>		

Example training plan reprinted from *Getting to Work: A Guide for Better Schools* by M. Rahn, et. al., Berkeley: MPR Associates.