Using the training planner

Guide one task at a time. Make room for practice and questions.

Showing a task once is like showing someone the map once and handing them the keys. Teach-back is the ride along.

Use this for onboarding, cross-training or a task that needs another practice. Showing someone once and getting a nod is not training. That is telling. Training is show it, watch them do it, hear them explain it, check it again.

1 Choose one useful task

Agree what the person needs to do and what a good result looks like. Use the current work method. If the task needs a sign-off or a license, get that first. This sheet is for the learning.

2 Ask before you show

Find out what the learner already knows. Watch the conditions around the work, including noise, interruptions, language, tools and time to practice. Ask what would help them feel confident.

3 Show it and explain why

Demonstrate the task at a pace the learner can follow. Explain the key steps, the reason for each important check and when to stop and get help. Invite questions.

4 Let the learner practice

Stay close enough to observe and support. Ask the learner to explain the task in their own words and then perform it. Saying "I understand" is not the same as showing the task.

5 Record what you actually saw

Write the specific step, explanation, gap or prompt. Avoid labels such as "slow" or "not trying." Notice whether the teaching or work conditions made learning harder. Give specific feedback and repeat what needs work.

6 Agree what happens next

Name the support, the person providing it and the next check. Ask what the learner still needs. Base the next step on observed work, not a fixed first-day speed. Recheck after time has passed and under normal work conditions.

Using the sheet

Print it or type in it. One sheet per task.

The next page walks one shift handoff through all six steps.

One idea like this every weekday: get the BBG Briefs at bigbeardedginger.com/library/briefs/

Training and teach-back planner

Build skill and confidence through practice. Short, specific notes are enough.

Learner	Trainer	Date
Alex Chen	Jordan Reed	Oct 14, 2026

1 Task and expected result

What should the learner be able to do? What shows it is right?

Give a clear shift handoff for an open order. The next shift can name the order, current status, open issue, next action and owner without guessing.

2 Start with the learner

What do they already know or do?

Alex knows the order screen and can find the order number and status.

What support or work conditions matter?

Use a quiet spot and a sample order.
Keep the handoff prompt card in view.
Ask which part feels least familiar.

3 Show the task and explain why

Key steps and why they matter

State the order and current status.
Name the open issue, next action and owner so work is not lost between shifts.

Key checks and when to ask for help

Ask the receiver to repeat the next action.
If status or owner is unclear, ask the shift lead before completing the handoff.

4 Practice with support

What will they try while you watch? What help will you give?

Jordan models a handoff and explains each point. Alex practices two sample orders while Jordan watches, pauses for questions and gives specific feedback.

5 Ask them to explain and perform

What did they explain and do? Be specific.

Alex explained why a named owner matters and gave the order and status without prompts. Asked the receiver to repeat the next action.

What gaps or help did you observe?

On the second practice, Alex left out the owner. After a prompt, named one and checked it with the receiver. Noise made the first attempt harder.

6 Agree the support and next check

What can they do now? What help remains? Who will check again, and when?

Alex will use the prompt card with Jordan nearby for the next live handoff.
Jordan will recheck on Oct 15 before the shift change, including who owns the next action. Alex asked to repeat one sample first. Allow time for that practice.

Ask what would help them feel ready. Adjust the teaching and conditions as needed.

Fill, save, then reopen to check your entries. Keep notes short so they print in full.