Training Evaluation Plan: Final Course Plan

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Executive Summary

A regional healthcare clinic requested a training recommendation after managers identified a recurring pattern of documentation errors among front-line staff. Although employees received feedback when mistakes occurred, many of the same issues persisted, increasing supervisory workload and contributing to inconsistent performance management practices across departments. Leadership was concerned not only with the documentation errors themselves but also with the absence of a consistent process for addressing performance concerns and reinforcing expectations over time.

A needs analysis revealed that the problem was not caused by a lack of technical knowledge. Documentation procedures were already established, and employees had previously received training on clinic requirements. Instead, the analysis identified a supervisory skill gap. Many front-line supervisors had been promoted for their strong individual performance and clinical expertise, but had limited experience in conducting corrective feedback conversations, documenting coaching discussions, and following up after performance concerns were identified.

This plan recommends a two-hour instructor-led workshop focused on corrective feedback, coaching documentation, and performance follow-up. The training uses realistic documentation scenarios, guided discussion, role-play, and action planning to help supervisors practice skills they are expected to use immediately upon returning to work. To support transfer, the program incorporates manager involvement before and after training, workplace job aids, coaching tools, and structured follow-up during the first month after implementation. Program

effectiveness will be evaluated through participant learning, manager observations, workplace application, and trends in documentation-related performance concerns.

Organizational Context

The clinic recently promoted several high-performing employees into front-line supervisory positions. While these individuals possessed strong technical knowledge of clinic procedures and daily operations, many had limited experience managing employee performance and conducting corrective coaching conversations. As a result, supervisors often relied on personal communication styles rather than a shared approach to addressing performance concerns.

During the previous six months, managers reported repeated documentation mistakes that continued despite coaching efforts. Employees were frequently reminded of expectations, but the quality of those conversations, the supporting documentation, and subsequent follow-up varied considerably across supervisors. This inconsistency created frustration, increased time spent revisiting the same issues, and made it difficult to ensure performance expectations were communicated consistently across departments.

Leadership's objective was not simply to reduce documentation mistakes. The broader goal was to strengthen supervisory practices, improve accountability, and establish a more consistent process for addressing performance concerns before they developed into larger performance management issues.

Training Need and Performance Issue

Accurate documentation is an important component of patient care, regulatory compliance, and operational efficiency within the clinic. Employees are expected to follow established documentation procedures, while supervisors are responsible for addressing errors, clarifying expectations, and monitoring improvement when concerns arise.

The current process varies considerably across departments. Documentation concerns are often addressed through informal verbal reminders, and supervisors do not consistently document coaching conversations or follow up on them. Managers reported having the same conversations repeatedly because expectations were not reinforced or monitored consistently after the initial discussion.

The performance issue is not a documentation knowledge problem. Employees have already received training on documentation requirements. Instead, the need centers on supervisory communication and performance management skills. Supervisors require a structured approach to delivering corrective feedback, documenting discussions, and following up on improvement efforts to ensure expectations are communicated consistently throughout the clinic.

Needs Analysis Summary

The needs analysis examined organizational priorities, job requirements, and learner characteristics to determine whether training was an appropriate intervention. Discussions with clinic leadership highlighted concerns about repeated documentation errors, inconsistent

supervisory practices, and the time managers spent revisiting the same performance issues. Leadership wanted supervisors to address issues more consistently and create greater accountability for improvement.

Analysis of supervisory responsibilities showed that effective performance management involved more than identifying documentation errors. Supervisors were expected to communicate expectations clearly, conduct coaching conversations, document performance discussions when necessary, and monitor employee progress over time. These behaviors were critical to reducing repeated mistakes but were not being performed consistently across departments.

The learner analysis indicated that participants had strong technical knowledge of clinic procedures but limited formal preparation for managing employee performance. Most supervisors had been promoted for being successful individual contributors rather than experienced people leaders. As a result, many lacked the confidence and experience needed to address recurring performance concerns.

Several human performance factors contributed to the issue. Newly promoted supervisors often relied on informal coaching approaches because they had never been taught a consistent process for delivering corrective feedback, documenting discussions, or following up after performance concerns were identified. Operational demands encouraged quick conversations that often ended without reinforcement or accountability. Some supervisors also reported discomfort addressing performance concerns with former peers. These findings indicated that training alone

would not resolve the problem and that manager reinforcement, job aids, and follow-up support would be necessary to sustain behavior change.

Target Learner Profile

The primary audience for this training is newly promoted front-line supervisors working within the healthcare clinic. Participants possess strong knowledge of clinic operations, documentation requirements, and day-to-day workflow expectations. However, they have limited experience managing employee performance, conducting coaching conversations, and addressing recurring performance concerns.

Because participants are already familiar with the technical aspects of the work, the training does not focus on documentation procedures. Instead, it focuses on the supervisory behaviors required when documentation concerns arise. Learning activities are built around realistic workplace situations, including repeated documentation mistakes, difficult coaching conversations, employee resistance, and follow-up discussions. This approach keeps practice activities closely aligned with situations supervisors are likely to encounter immediately after training.

Training Goal and Learning Objectives

The purpose of this training is to help newly promoted supervisors address documentation concerns more effectively by delivering clear corrective feedback, documenting coaching conversations, and following up consistently when performance concerns arise. The training is intended to establish a common supervisory approach across departments so that

expectations are communicated clearly, and performance issues are addressed before they become recurring problems.

By the end of the training, supervisors will be able to:

1. Identify communication breakdowns that contribute to recurring documentation errors.
2. Conduct a corrective feedback conversation that clearly explains the issue, performance expectations, and required next steps.
3. Complete a coaching documentation form that accurately records the discussion and expected improvement.
4. Develop a follow-up plan to reinforce expectations and monitor employee progress after a documentation concern has been addressed.

These objectives focus on behaviors supervisors are expected to perform on the job and align directly with the clinic's goal of improving supervisory consistency and reducing repeated documentation mistakes (Noe, 2023).

Training Design Blueprint

The workshop is built around a challenge supervisors regularly face: employees continue to make documentation mistakes even after receiving feedback. Rather than relying on lecture-based instruction, the training mirrors the process supervisors are expected to use in the workplace. Participants examine why coaching conversations sometimes fail to produce improvement, observe an effective feedback discussion, practice the skill through role-play, complete coaching documentation, and develop a plan for workplace application.

Activities move supervisors from recognizing common communication breakdowns to practicing a structured response. Case discussions help participants identify factors contributing to repeated mistakes; role-play provides an opportunity to practice delivering corrective feedback in a low-risk environment; documentation exercises reinforce consistency; and action planning prepares supervisors to apply the process after training. A complete alignment table is provided in Appendix A.

Adult Learning and Facilitation Strategy

Supervisors are most likely to engage with training when they can immediately see how it applies to their work. For that reason, the workshop focuses on recurring documentation concerns, coaching conversations, and follow-up discussions rather than policy review or leadership theory. Participants analyze realistic situations, discuss possible responses, practice new skills, and receive feedback throughout the session.

Role-play is the primary practice activity because corrective feedback is a behavioral skill that improves through observation and repetition. Supervisors first observe an effective feedback conversation and then apply the process themselves using realistic workplace scenarios. Feedback from peers and the facilitator allows participants to refine their approach before returning to work. The workshop concludes with an action-planning exercise that requires participants to identify a specific opportunity to apply the process within their own department (Noe, 2023).

The facilitator guides discussion, models effective feedback techniques, and coaches participants during practice activities. Throughout the session, emphasis is placed on

communicating expectations clearly, documenting conversations consistently, and establishing accountability for improvement.

Training Materials and Delivery Plan

The workshop uses a combination of facilitator resources, participant tools, and workplace support materials designed to support both learning and application. Materials include a facilitator guide, a documentation scenario, a coaching documentation form, an observation checklist, a feedback job aid, and an action-planning worksheet. Each resource supports either skill development during training or workplace application after participants return to their departments.

The training is delivered as a two-hour instructor-led workshop that combines discussion, demonstration, practice, feedback, and action planning. Cohort size should remain small enough to allow active participation and individualized feedback during role-play activities. A detailed training agenda is provided in Appendix B, and supporting tools are included in the appendices.

Transfer of Training and Performance Support Plan

Training alone is unlikely to reduce repeated documentation mistakes. Supervisors must have opportunities to apply the feedback process in real workplace situations and receive reinforcement after returning to their departments. Transfer support is therefore built into the training process before, during, and after the workshop.

Before training, department managers will discuss expectations with participating supervisors and explain why consistent coaching, documentation, and follow-up are important to

clinic operations. Establishing expectations before training reinforces that these skills are part of the supervisor's role rather than optional communication techniques.

During training, participants practice the feedback process through role-play, receive feedback from peers and the facilitator, and complete an action-planning exercise focused on an upcoming employee conversation. Supervisors leave the workshop with a feedback job aid and coaching documentation form that can be used immediately on the job.

After training, managers will review one employee feedback interaction each week during the first month and provide coaching as needed. Follow-up discussions will focus on the clarity of expectations, the quality of coaching documentation, and progress made after the conversation. These discussions create accountability for applying the process and provide supervisors with continued support as they build confidence using the new skills.

Several barriers may limit transfer, including discomfort with corrective conversations, competing operational priorities, and limited time during busy clinic periods. Manager coaching, workplace job aids, and structured follow-up discussions are intended to reduce these barriers and encourage consistent use of the process across departments.

Implementation and Logistics Plan

The workshop will be delivered as a two-hour instructor-led session for newly promoted supervisors. Cohorts should be limited to approximately 10-15 participants to allow sufficient time for discussion, practice, and individualized feedback. The program can be conducted in an

existing conference room or delivered virtually through the clinic's meeting platform if operational needs require remote participation.

Implementation will require coordination between department managers, participants, and the facilitator. Managers should receive training schedules in advance and communicate expectations before supervisors attend the workshop. This preparation positions the training as part of the clinic's broader supervisor development efforts rather than a stand-alone event.

Following implementation, managers will conduct brief weekly follow-up discussions during the first month to reinforce skill application and address challenges encountered in practice. Documentation trends should be reviewed approximately 60 to 90 days after implementation to assess improvement and determine whether additional coaching or program modifications are needed.

Evaluation Plan

The evaluation strategy focuses on a central question: Are supervisors using the feedback process consistently, and is that change contributing to fewer documentation-related performance issues?

Reaction data will be collected via a brief end-of-session survey assessing relevance, confidence, and perceived usefulness. Although participant reactions do not demonstrate behavior change, they provide insight into whether supervisors view the training as relevant to their work responsibilities.

Learning will be evaluated during the workshop through observation of role-play activities and review of completed coaching documentation exercises. These activities allow the facilitator to assess participants' ability to perform the core behaviors addressed in the learning objectives.

Transfer will be assessed during the first month following training through manager observations and follow-up discussions. Managers will evaluate supervisors' use of the feedback process, coaching documentation practices, and follow-up discussions related to performance concerns.

Results evaluation will focus on workplace outcomes. Documentation error trends, recurring performance concerns, and manager feedback will be reviewed before implementation and again 60 to 90 days after training. The purpose of this review is not simply to measure participant satisfaction but to determine whether supervisory practices improved and contributed to measurable operational benefits.

Evaluation findings will be used to identify coaching needs, improve training materials, and determine whether the workshop should become a standard component of supervisor onboarding and development.

Resource, Cost, and Benefit Considerations

Implementation requires a facilitator, training materials, supervisor participation time, and manager follow-up after training. Because the workshop relies primarily on existing clinic resources and internal examples, direct implementation costs are expected to remain relatively

low. Employee time spent attending the workshop and participating in follow-up activities represents the primary organizational investment.

Expected benefits include more consistent supervisory practices, clearer communication of performance expectations, improved coaching documentation, and fewer repeated documentation mistakes. Over time, supervisors should spend less time revisiting the same performance concerns, allowing greater attention to patient care, operational priorities, and employee development.

Ethical, Legal, Accessibility, and Practical Considerations

Training materials should be accessible to all participants and available electronically when needed. Role-play activities and case examples should use fictionalized situations rather than actual employee information to protect confidentiality and avoid unnecessary disclosure of personnel matters.

Corrective feedback discussions should focus on observable workplace behaviors, documented performance concerns, and clearly communicated expectations. Consistent application of the feedback process across departments helps reduce perceptions of unfair treatment and supports equitable performance management practices.

From a practical standpoint, training should be scheduled to minimize disruption to clinic operations while still allowing supervisors adequate time to participate, practice new skills, and complete follow-up activities. Manager involvement is particularly important because long-term behavior change depends on reinforcement after training rather than on the workshop alone.

Final Recommendations

The needs analysis indicated that recurring documentation errors were not primarily caused by insufficient technical knowledge. Employees had already received instruction on documentation requirements. The larger challenge involved inconsistent supervisory practices, limited coaching experience among newly promoted supervisors, and insufficient follow-up after performance concerns were identified.

The recommended workshop addresses these issues by providing supervisors with a practical process for corrective feedback, coaching documentation, and performance follow-up. The design emphasizes realistic workplace scenarios, active practice, manager involvement, and post-training support to increase the likelihood that learning will transfer to the job.

The clinic should implement the program as part of its supervisor development process, require managers to follow up during the first month after training, and review documentation trends within 60 to 90 days of implementation. Implementing this recommendation will create greater consistency in performance management practices, strengthen supervisory effectiveness, and reduce repeated documentation mistakes across departments.

Appendix A

Training Alignment Table

Performance Need	Learning Objective	Learning Activity	Evaluation Method
Supervisors address documentation errors inconsistently.	Identify communication breakdowns that contribute to recurring documentation errors.	Documentation error case discussion	Knowledge check and discussion
Supervisors rely on informal verbal reminders rather than structured feedback.	Conduct a corrective feedback conversation that clearly explains the issue, expectations, and next steps.	Facilitated role-play	Observation checklist
Feedback discussions are not consistently documented.	Complete a coaching documentation form accurately.	Documentation practice exercise	Form review
Follow-up after feedback conversations is inconsistent.	Develop a follow-up plan to reinforce expectations and monitor improvement.	Action-planning activity	Follow-up plan review

Training Goal: Strengthen supervisory communication by providing a consistent process for corrective feedback, coaching documentation, and performance follow-up related to recurring documentation errors.

Appendix B

Training Agenda: Clear Feedback Conversations for New Supervisors

Time	Topic	Activity
0:00–0:10	Introduction and Training Purpose	Review clinic performance concerns, workshop objectives, and expectations for participation
0:10–0:25	Understanding Documentation Errors	Discuss recurring documentation errors and common communication breakdowns that contribute to repeated mistakes
0:25–0:40	Elements of Effective Feedback	Compare vague feedback with behavior-based feedback and identify characteristics of effective coaching conversations
0:40–0:55	Facilitator Demonstration	Observe a model feedback conversation addressing a documentation error
0:55–1:25	Supervisor Role-Play Practice	Conduct corrective feedback conversations using realistic documentation-error scenarios and peer observation
1:25–1:40	Coaching Documentation Practice	Complete a coaching documentation form based on the role-play scenario
1:40–1:50	Follow-Up Planning	Develop a plan for reinforcing expectations and monitoring improvement after a feedback conversation
1:50–2:00	Action Planning and Wrap-Up	Identify an upcoming workplace conversation and commit to one specific application step

Training Format: Two-hour instructor-led workshop

Primary Methods: Discussion, facilitator demonstration, role-play, documentation practice, peer feedback, and action planning

Participant Materials: Feedback job aid, coaching documentation form, observation checklist, documentation-error scenario, and action-planning worksheet

Appendix C

Corrective Feedback Job Aid

Step	Key Actions
Prepare	Identify the documentation issue. Gather an example. Review the expected standard.
Describe the Issue	State the concern clearly. Focus on observable behavior. Use specific examples.
Explain the Impact	Explain why the issue matters for workflow, patient care, or compliance.
Clarify Expectations	State what needs to change. Describe the expected standard. Confirm understanding.
Invite Input	Ask questions. Discuss barriers. Encourage clarification.
Set Next Steps	Agree on corrective actions. Establish a follow-up date.
Follow Up	Document the discussion. Monitor progress. Review improvement.

Sample Phrases

Situation	Example
Opening the discussion	"I'd like to discuss a documentation concern and review expectations moving forward."

Clarifying expectations	"The expectation is that all required chart information is completed before submission."
Establishing accountability	"Let's review progress again on _____."
Closing the discussion	"What questions do you have about the expectations we discussed today?"

Appendix D

Manager Follow-Up Checklist

Supervisor: _____

Date: _____

Employee Situation Discussed: _____

Feedback Conversation Review

Behavior	Yes	No
Clearly identified the documentation concern	□	□
Used specific examples	□	□
Explained expectations clearly	□	□
Maintained a professional and supportive tone	□	□
Established next steps for improvement	□	□
Scheduled or discussed follow-up	□	□

Coaching Notes

What went well?

_____

_____

What could be improved?

_____

_____

Follow-Up Questions

□ What part of the conversation felt most effective?

□ What challenges did you encounter?

□ What support do you need moving forward?

□ What is one action you will focus on before our next check-in?

Manager Action Items

_____

_____

Next Check-In Date: _____

Appendix E

Evaluation Instruments

Post-Training Participant Survey

Completed by: Training participants

Timing: End of workshop

Purpose: Assess participant reactions, confidence, and readiness to apply the feedback process.

Instructions: Rate each statement using the scale below.

1 = Strongly Disagree 2 = Disagree 3 = Neutral 4 = Agree 5 = Strongly Agree

Statement	1	2	3	4	5
The training was relevant to my supervisory responsibilities.	□	□	□	□	□
The documentation scenarios reflected situations I encounter at work.	□	□	□	□	□
I feel confident conducting a corrective feedback conversation.	□	□	□	□	□
I understand how to document a coaching discussion.	□	□	□	□	□

I am prepared to apply the process in my department. □ □ □ □ □

What was the most useful part of the training?

_____

_____

What additional support would help you apply these skills?

_____

_____

Role-Play Observation Checklist

Completed by: Facilitator

Timing: During workshop practice activities

Purpose: Assess participant performance during corrective feedback role-play exercises.

Instructions: Mark "Yes" if the participant demonstrated the skill during the role-play exercise.

Skill Demonstrated	Yes	No
Clearly explained the documentation concern	□	□
Used specific examples to describe the issue	□	□

Communicated performance expectations	□	□
Explained the impact of the documentation error	□	□
Encouraged employee questions or discussion	□	□
Established next steps for improvement	□	□
Identified a follow-up plan or timeline	□	□

Strengths

_____

_____

Coaching Opportunities

_____

_____

_____

30-Day Transfer Review

Completed by: Department manager

Timing: Approximately 30 days after training

Purpose: Evaluate workplace application of the feedback process and identify additional coaching needs.

Instructions: Review recent coaching conversations and discuss workplace application with the supervisor. Mark "Yes" if the behavior has been consistently demonstrated during the previous 30 days.

Workplace Application	Yes	No
Addresses documentation errors promptly	□	□
Uses a consistent feedback process	□	□
Communicates expectations clearly	□	□
Documents coaching discussions appropriately	□	□
Conducts follow-up conversations when needed	□	□
Demonstrates increased confidence when addressing performance concerns	□	□

Examples or Notes

Additional Coaching Needed

Next Follow-Up Date: _____

References

Noe, R. A. (2023). *Employee training and development* (8th ed.). McGraw Hill.