

Worksheet: Trainer Self-Inventory

What's your current role?

What do you do day-to-day? Who do you support or train, formally or informally?

How did you become the person responsible for training others?

Was it intentional? Did you fall into it? Were you asked to present, lead a session, or mentor a new hire?

What topics or skills do people come to you for help with?

What do you enjoy about helping others learn?

When you're at your best, what's happening?

Before you dive into the chapters ahead, take 10–15 minutes to reflect on where you are right now as a trainer. There are no wrong answers — just insights that will help you grow.

What makes you nervous about training or presenting?

On a scale of 1 to 10, how confident do you feel in your ability to train others today?

1 = "What am I doing here?"

5 = "I have some idea, but I'm winging it."

10 = "Put me in, coach — I'm ready!"

Circle your number: 1 2 3 4 5 6 7 8 9 10

What's one thing you'd like to improve or learn by the end of this book?

Pro Tip: Hang on to this page. When you finish the book, revisit your answers and reflect on how far you've come.

Worksheet: Self-Paced Learning Plan

Take a few minutes to clearly identify areas where you need more knowledge or practice. Be honest—the clarity you gain here will directly guide your growth. Then, based on your inventory, outline clear actions you'll take, resources you'll use, and deadlines for your self-paced learning. I've given you a head start...

[illegible]



1. AUDIENCE

Who is your audience?

What are their primary responsibilities or goals?

What challenges or pain points do they face?

What motivates them to engage with your training?

How do they prefer to learn?
Live | Webinar | Hybrid | Recorded

3. PRESENTATION

What delivery method will you use?
Live | Webinar | Hybrid | Recorded

Why?

What's the setting or environment?

2. MESSAGE

What's the core topic or content of your training?

What does your audience need to know about this topic?

-
-
-

What does your audience need to do with this information?

How will you make the message relevant to their world?

What's your call to action?

What tools or materials will you use to deliver the content?

How will you engage the audience?

What's your backup plan for tech or logistical issues?

How long will the training be, and how will you manage time?

Worksheet: Presentation Planning Grid

Use this grid to structure your next training session. Break your content into five clear sections: Opening, Main Points, Transitions, Engagement, and Closing. Estimate how much time you'll spend in each part, note your delivery method (script, bullets, demo, etc.), and jot down cues or reminders for key transitions.

Section	Time Allotted	Delivery Method	Key Content / Cues / Notes
Opening			
Main Point #1			
Main Point #2			
Main Point #3			
Engagement Activity			
Closing			

Worksheet:

Build Your Own Program

STEP 1: Draft Your Course Description

Write 2–3 sentences that describe what your course is about, who it's for, and why it matters.

STEP 2: Define Learning Objectives

Each one should complete this sentence: "After this training, participants will be able to..."

-
-
-
-

STEP 3: Map your AMP Strategy

Audience: Who are they? What do they care about?

.

Message: What do you need them to learn, believe, or change?

.

Presentation: What's the best way to deliver this?

STEP 4: Create a Training Outline

Opening (set the tone, preview key points)

.

Section 1:

Section 2:

Section 3:

Close (reinforce, challenge, call to action)

STEP 5: Brainstorm Interactivity

Choose at least one interactive element

-
-

STEP 6: Plan for Delivery

Will it be in-person or virtual?

Will it need to be CE-accredited or informal training?

How will you adapt it for different time slots or audiences?

Worksheet:
REAL Storytelling

Great stories don't just happen—they're crafted. Create a few of your own stories for your different training classes using the simple structure I call the REAL formula. Refer back to the chapter if you need a reminder of the framework.

[illegible]

Worksheet:

Plan B Scenario Prep

Technology Failure (no slides, projector, laptop)

Primary Plan:

Backup Plan:

What I'll Bring:

You Forget a Key Point or Lose Your Place

Primary Plan:

Backup Plan:

Support Tools (notes, cue, etc.):

Audience is Disengaged or Distracted

Primary Plan to Re-engage:

Interactive Element to Add:

Reset Strategy (movement, humor, story):

Use this worksheet to think through the most common disruptions that could throw your training off course—and decide how you'll handle them in advance. The goal isn't to expect disaster; it's to be so prepared that it doesn't rattle you when it comes. **Instructions:** For each scenario, write out your primary strategy (what you'll try first), any backup actions, and what tools or people you'll rely on.

You Don't Know the Answer to a Question

How I'll Respond in the Moment:

Follow-up Method (who, when, how):

How I'll Capture & Learn from it:

Disruptive Attendee (heckler, side conversations)

What I'll Say to Acknowledge:

How I'll Redirect:

Boundary I'll Set:

Bonus Prep

My Go-To Story for Buying Time:

My "Phone-a-Friend" Contact:

One Thing I Will Always Bring as Backup:

Worksheet: The Takeaway Builder

Define the Desired Future State

What transformation should your audience experience after the training?

Identify Core Motivators

What is driving your audience (time, money, risk, reputation, etc.)?

Tell a Relatable Story

What story illustrates your key message and connects emotionally?

Tap Into Emotion

What emotions will you intentionally trigger to make the message stick?

Use a Signature Phrase or Visual

Write a memorable one-liner or describe a physical/visual anchor.

Use this worksheet to plan a strong, memorable close to your training using the 10 strategies from this chapter. This is your opportunity to make your message resonate long after the session ends.

Reinforce with Repetition

List how and when you'll repeat your core message throughout the session.

Provide a Tangible Takeaway

What physical or digital tool will you leave behind to reinforce learning?

End with a Strong Call to Action

What specific action will you challenge your audience to take?

Offer Continued Support

How will you make yourself available for follow-up questions or guidance?

Close with Purpose

Write your final statement, quote, or image to bring the session to a powerful close.

Worksheet: Post-Training Survey

Use this worksheet to gather feedback from your audience, evaluate your own performance, and identify areas for growth. You can adapt the questions for a digital tool like Google Forms, SurveyMonkey, or printed handouts.

Section 1: Survey for Participants

Choose how you'll distribute this survey:

- ☐ QR Code ☐ Online Link ☐ Printed Handouts
☐ Verbal Feedback Invitation

Course Title: _____

Date: _____

Location/Format: _____

1. How relevant was the content to your role?

- ☐ Very Relevant ☐ Somewhat Relevant ☐ Not Relevant

2. Was the material presented clearly and effectively?

- ☐ Yes ☐ Somewhat ☐ No

3. What part of the training was most helpful or impactful to you?

4. What part of the training could be improved?

5. How would you rate the trainer's delivery and engagement?

- ☐ Excellent ☐ Good ☐ Fair ☐ Poor

6. Would you recommend this training to a colleague?

- ☐ Yes ☐ No Why or why not?

7. Any additional comments or suggestions?

Section 2: Self-Debrief for the Trainer

Complete this immediately after the session while details are fresh.

Part A: Self-Evaluation

1. What went well in this session?

2. What didn't go as planned, and how did I adapt?

3. What feedback did I receive in real-time (verbal or non-verbal)?

4. What surprised me about this group or setting?

5. What is one thing I will do differently next time?

Part B: Growth Opportunities

6. Are there patterns emerging in my survey feedback?

Yes or No. If yes, describe:

7. What topic(s) might need additional clarification next time?

8. Is this session ready to be used by another trainer? If not, what needs to happen first?

9. What's one thing I can coach another trainer on based on this experience?

10. Who could I begin mentoring to deliver this training in the future?