

Training Manual and Playbook Template

Use this manual and playbook to teach job skills, provide practice, and support application at work. Keep instruction, task procedures, recurring-situation plays, and assessment evidence connected while giving each a clear purpose.

Complete the bracketed fields with approved information for the product, organization, or program being documented. Repeat the named forms where several tasks or subjects need separate records. Remove sections that do not apply and retain links to the material used to complete the document.

Document control	Entry
Document identifier	[Identifier used by your team]
Scope and applicable version	[Product, program, locations, and version covered]
Prepared and maintained by	[Responsible role or team]
Revision and review	[Revision, review date, and approval reference]

Program Introduction

Define the training audience and job outcomes before laying out the modules. Identify how learners, trainers, and supervisors use the manual and record progress.

Field	Complete with
Purpose and audience	[Job roles, scope, intended performance, and applicable product or process version]
Entry requirements	[Prior learning, qualifications, tools, access, and preparation]
Learning path	[Modules, prerequisites, sequence, and terminal objectives]
Responsibilities	[Learner, trainer, supervisor, support roles, and progress-record reference]

Foundations

Explain the shared concepts and conditions needed for the practical modules. Place relevant safety information before any hands-on activity.

Field	Complete with
Concepts	[Core terms, process context, systems, and relationships used throughout the training]
Work conditions	[Materials, equipment, access, environment, and normal operating state]
Safety and rules	[Source-stated hazards, precautions, qualifications, and approved work rules]
Readiness	[Checks or prior knowledge needed before practice and the evidence of readiness]

Training Modules

Repeat the module record for each skill or job area in teaching order. Keep a skill lesson and the procedures it prepares a learner to perform in the same module.

Field	Complete with
Module identity	[Module, skill, job outcome, prerequisites, and objective identifiers]
Lesson plan	[Explanation, demonstration, worked material, questions, and learning resources]
Guided practice	[Task, conditions, materials, expected result, feedback, and support]
Assessment connection	[Evidence required, achievement criterion, and remediation or next module]

Job Breakdown Procedure

Repeat this form for each task taught in a module. State the action, the key point that affects correct performance, and the result used to check the work.

Field	Complete with
Task	[Desired outcome, applicable role, task conditions, and procedure reference]
Before practice	[Tools, material, access, isolation or precautions, and starting state]
Demonstration	[Trainer actions, explanation of key points, and questions to confirm understanding]
Independent performance	[Learner task, observation record, feedback, and expected final state]

Repeat this procedure for each supported task or variant. Place the applicable warning before the affected action and record a result that can be checked.

Step	Action	Expected result	Evidence
1	[One action using the exact interface label or approved command]	[Observable state]	[Check or record]
2	[Next action in dependency order]	[Observable state]	[Check or record]
3	[Verification or handover action]	[Completion condition]	[Retained evidence]

Playbook

Use a play for a recurring situation or trigger at work. Link to the full task procedures instead of duplicating their steps in each play.

Field	Complete with
Situation and trigger	[When the play applies, intended outcome, audience, and constraints]
Preparation	[Information, permissions, tools, and related procedures required]
Decision and action	[Decision points, action sequence, escalation condition, and support reference]
Outcome and follow-up	[Observable result, record to retain, next task, and feedback]

Job Aid

Create a concise aid only after the full task or play is documented. Keep the aid's actions consistent with the source procedure and identify where the complete guidance is located.

Field	Complete with
Aid purpose	[User, task or situation, and point of use]
Essential sequence	[Condensed actions, key checks, and source-defined warnings]
Decision support	[Condition, appropriate next action, and escalation reference]
Source and control	[Full procedure or play, applicable version, revision, and maintenance role]

Assessment and Qualification

Assess the performance a learner is expected to demonstrate. Keep the actual criterion, observed evidence, and the decision separate and record any additional practice needed.

Field	Complete with
Assessment	[Task or module, objective, conditions, assessor role, and required evidence]
Criterion	[Observable performance or knowledge criterion and approved pass decision rule]
Observation	[What the learner did, result, evidence, feedback, and unresolved gap]
Disposition	[Achieved, further practice, reassessment, or other approved status and follow-up]

Performance Record

Performance criterion	Observed evidence	Result	Feedback and next action
[Observable criterion]	[Work or response observed]	[Approved result]	[Feedback and action]

Glossary

Define job terms and abbreviations used by the modules and plays. Use the same names in lessons, task procedures, job aids, and performance checklists.

Field	Complete with
Term	[Job, process, product, or training term and abbreviation]
Definition	[Meaning used for this program and applicable context]
Learning reference	[Module, procedure, play, job aid, or authoritative source]
Usage	[Preferred wording, related term, and distinction a learner should understand]