Example of a Training Matrix for Change Management

Is a change in knowledge or skills needed to execute the procedure?	Is the process or change complex? Are there multiple changes?	Criticality of process and risk of performance error? What is the difficulty in detecting errors?	What is the identified audience (e.g., location, size, department, single site vs. multiple sites)?	Is the goal to change workers' conditioned behavior (e.g., changing habits, changing routine activities)?	What kind of training is required?
No. Change(s) are editorial or content changes do not alter the intent or meaning of the procedure or process.	No. Minimal change(s) that is not complex.	No risk to product or patient. No risk posed by performance error. There is no difficulty in detecting errors.	N/A	No	No training required
Change(s) are editorial or minor. However, employee awareness and acknowledgement is required.	No. One or more minor changes that is simple and easy to understand.	No or low risk to product or patient. No or low risk posed by performance error. There is no difficulty in detecting errors.	Any audience	No	Pre Job Briefing
Yes. When trainees need the opportunity to talk through change(s) and ask questions about the rationale behind the change(s).	Yes. Moderately complex change(s) that is significant enough that training requires more than read and understood, as well as provides trainees with the opportunity to talk through the change(s) and ask questions about the rationale behind the change(s).	Medium risk to product or patient. Medium risk posed by a performance error. There is minor difficulty in detecting errors.	Small, co-located groups.	Yes. There is a low or medium level of interaction with feedback. Provides opportunity for discussion between trainer and trainee.	Structured Discussion
Yes. When knowledge or skills are impacted or when new behavior or skills need to be learned or reinforced.	Yes. Moderately complex change(s) where scenarios and feedback are needed to reinforce new knowledge or skills.	Medium risk to product or patient. Medium risk posed by a performance error. There is minor difficulty in detecting errors.	Large groups that may be geographically diverse.	Yes. Simulated online activity, feedback, and assessment(s).	Computer-Based Training
Yes. The complexity of the change(s) requires face-	Yes. Moderate to highly complex change(s)	Medium or high risk to product or patient. Medium or high risk	Any size population that can be broken down into manageable	Yes. There is a high level of interaction with real-time	Instructor-Led Training

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to-face interaction to give trainees the opportunity to talk through changes and ask questions, while providing behavior reinforcement and the opportunity to practice new skills/behaviors in a safe setting.	that requires critical thinking to perform, while providing a safe setting to reinforce knowledge and practice new skills/behaviors.	posed by a performance error. There is a medium to high difficulty in detecting errors.	groups	responses to participants. Provides elaboration and examples, as well as a classroom assessment(s).	
Yes. When practical application in the work environment and real-time feedback is necessary to reinforce skills/behavior.	Yes. Highly complex or new skills/knowledge required, such as using specific equipment/tools or performing complex tasks. The goal is to measure the trainee's proficiency in the targeted competency.	High risk to product or patient. High risk posed by a performance error. There is a high difficulty in detecting errors.	Any size population, however it is intended to be a one-on-one training experience.	Yes. There is a high level of interaction, with real-time question and response between trainer and trainee. Provides immediate feedback and coaching, as well as a real-time competency assessment.	On-the-Job Training