STANDARD OPERATING PROCEDURE

Train the Trainer SOP

Document no.	SOP-TRN-006
Revision	1.0
Owner	Training Manager
Effective date	September 15, 2026
Review cycle	Every 12 months

1. Purpose

To prepare subject matter experts to deliver training confidently and consistently, and to certify only those who can facilitate a session well, not just perform the task themselves.

2. Scope

Applies to employees being developed as internal trainers or facilitators for any course. Delivering a specific training session once certified is covered by the employee training SOP.

Definitions

Master Trainer	An experienced trainer who certifies new trainers and maintains the train-the-trainer curriculum.
Teach-back	A practice session where a trainer candidate delivers part of a course to an audience of peers or a master trainer for feedback.
Co-facilitation	A live session delivered jointly by a newly trained trainer and a certified trainer before the new trainer runs a session solo.

3. Responsibilities

Master Trainer	Delivers the train-the-trainer course, evaluates teach-backs, and certifies new trainers.
Trainer Candidate	Completes the train-the-trainer course, practices delivery, and co-facilitates before certification.
Training Manager	Selects candidates, approves certification, and schedules refresher sessions for certified trainers.
Subject Matter Expert	Confirms the technical accuracy of the content the candidate will be certified to deliver.

RACI matrix

Activity	Master Trainer	Trainer Candidate	Training Manager	Subject Matter Expert
Select trainer candidates	C	I	R/A	I
Deliver the train-the-trainer course	R/A	R	I	-
Evaluate teach-back sessions	R/A	R	I	C

Activity	Master Trainer	Trainer Candidate	Training Manager	Subject Matter Expert
Certify the new trainer	R	I	R/A	-
Schedule trainer refreshers	C	I	R/A	-

R = Responsible, A = Accountable, C = Consulted, I = Informed

4. Materials and PPE

Materials, tools and systems

- Train-the-trainer course materials
- Facilitation skills checklist
- Teach-back evaluation form
- Course content the candidate will be certified to deliver
- Trainer certification log

5. Procedure

Step	Task	Owner	Done
5.1	**Select a trainer candidate** The training manager selects a candidate based on subject expertise, communication skills and willingness to take on a training role, with input from their current manager.	Training Manager	☐
5.2	**Confirm subject expertise** The subject matter expert confirms the candidate has a strong working knowledge of the content they will be certified to train others on. **Checkpoint:** Candidates start the train-the-trainer course only once their subject expertise is confirmed.	Subject Matter Expert	☐
5.3	**Deliver the train-the-trainer course** The master trainer delivers the course covering facilitation skills, such as managing group discussion, handling questions, pacing a session and using training materials effectively.	Master Trainer	☐
5.4	**Assign a teach-back topic** The master trainer assigns the candidate a section of an actual course to prepare and deliver as a teach-back to a small audience.	Master Trainer	☐
5.5	**Deliver the teach-back** The candidate delivers the assigned teach-back to peers or a master trainer, practicing pacing, engagement and handling questions on real content.	Trainer Candidate	☐
5.6	**Evaluate the teach-back** The master trainer scores the teach-back against the facilitation skills checklist and gives specific, actionable feedback to the candidate. **Checkpoint:** The candidate meets the minimum score on the facilitation skills checklist before moving to co-facilitation.	Master Trainer	☐
5.7	**Address any gaps** If the teach-back falls short, the master trainer coaches the candidate on the specific gap and schedules another teach-back before proceeding.	Master Trainer	☐
5.8	**Shadow a live session** The candidate observes a certified trainer deliver a full live session to see facilitation skills applied with a real audience and real questions.	Trainer Candidate	☐

Step	Task	Owner	Done
5.9	**Co-facilitate a live session** The candidate co-facilitates a live session with a certified trainer, delivering an agreed portion while the certified trainer observes and supports as needed.	Trainer Candidate	☐
5.10	**Certify the trainer** The master trainer confirms the candidate met the required standard across the teach-back and co-facilitation, and the training manager certifies them as an approved trainer for that content.	Master Trainer	☐
5.11	**Log certification and schedule refreshers** The training manager logs the trainer's certification and content scope in the trainer certification log and schedules a periodic refresher or recertification.	Training Manager	☐

6. Quality checks

- Every certified trainer has a completed facilitation skills evaluation on file.
- No trainer is certified without at least one co-facilitated live session.
- Certified trainers are only assigned content matching their certified scope.
- Feedback from teach-backs is specific enough for the candidate to act on.

7. Records

- Facilitation skills checklist and teach-back evaluation
- Co-facilitation observation notes
- Trainer certification log with content scope
- Refresher and recertification schedule

8. KPIs

- Percentage of candidates certified on first attempt
- Time from selection to certification
- Learner satisfaction ratings for newly certified trainers
- Number of active certified trainers per subject area

9. Common mistakes

- Certifying someone as a trainer based on subject expertise alone, without assessing facilitation skill.
- Skipping the co-facilitation step and moving straight to solo delivery.
- Giving generic feedback on a teach-back instead of specific, actionable points.
- Letting certifications go stale with no refresher schedule.

10. Revision history

Revision	Date	Description	Reviewed by
1.0	September 15, 2026	Initial release	Alexa Uskova

Approval

Prepared by	Approved by	Date

This is a template. Adapt it to your organization, equipment and local regulations before use.

Scan for the latest version

Opens this template online, where you can download it again in Word, PDF, Excel or CSV — free, no sign-up.

Or add it to Perfect Wiki so your team can find it and ask questions about it in Microsoft Teams, Slack, kChat or Mattermost.