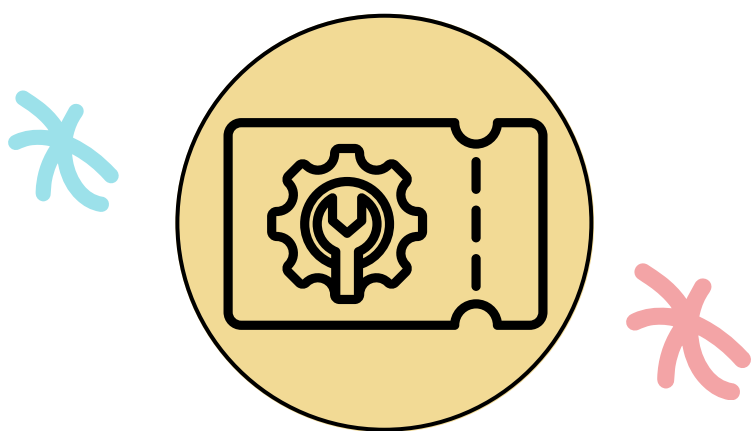


RECURRING TRAINING TICKET CHEAT SHEET

BUILD THE HABIT. NORMALIZE THE CULTURE.
TRAIN LIKE IT'S TICKETED

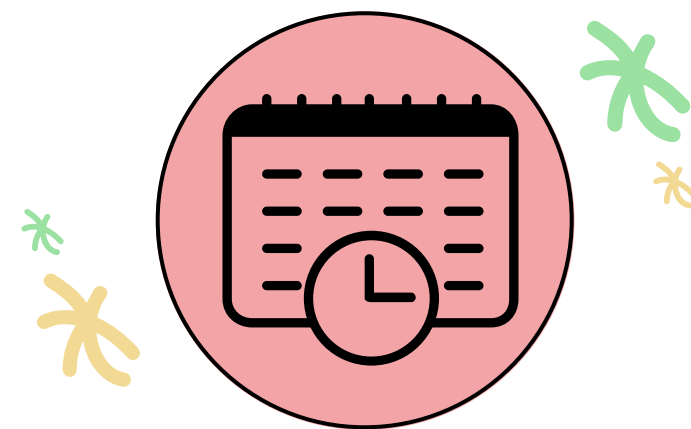


1 Create A Recurring Ticket Template



Create a recurring ticket template in
your PSA (most PSA's support templates)

2 Schedule It Consistently



Same day/time every week or every
other week. "Thursdays at 3:30 are my
training time"

3 Dont Abdicate the Decision to Skip

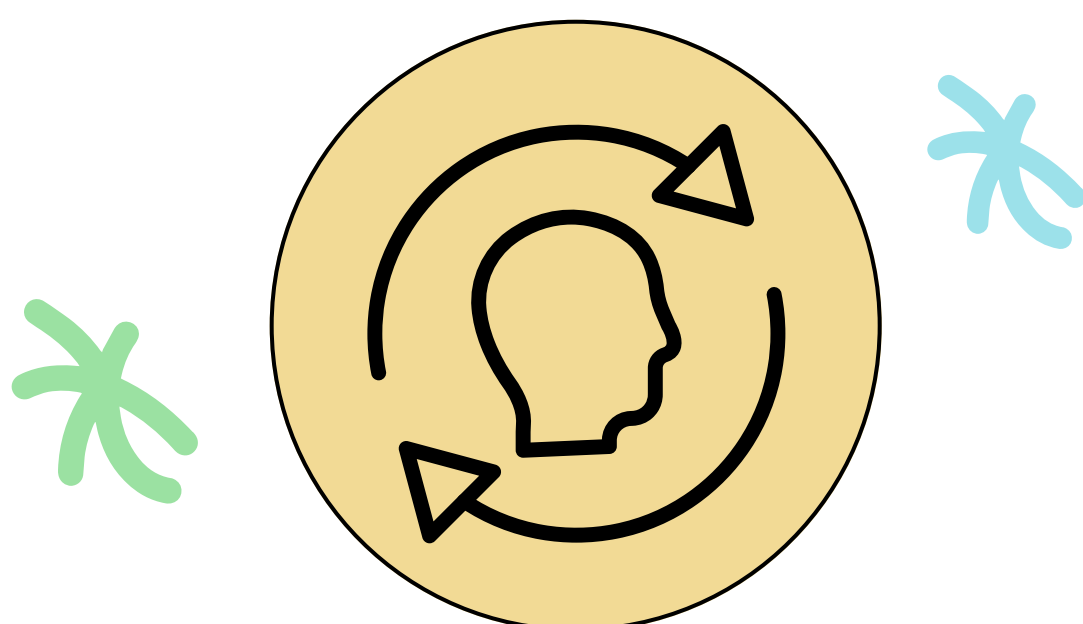


Don't leave the decision to skip training
up to the tech. Emergencies happen, but
bumping should be managed like any
other internal priority.

4 Techs Will Always Prioritize Clients



Techs will always prioritize client facing
work unless you prioritize training. Put it
on their schedule. Make a ticket. Enforce
it. Training matters.



5 Build a Habit

All habits require structured repetition before
they are formed. Keep the ticket hygiene as
close to client facing tickets as possible and
keep to the repeating schedule as often as
possible. Repeat for at least 5 weeks before
assuming a habit is formed

RECURRING
TRAINING TICKET
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Field	Recommendation
Name	Internal Training – [Tech Name] or Weekly Training – [Team]
Type / Category	Internal / Training / Professional Development
Work Type / Role	Billable at \$0 or 0x multiplier – utilized & reportable
Client	Your MSP (treat yourself as the client!)
Assignment	Tech, Role Group, or Team Lead
Frequency	Weekly or Bi-Weekly. 30–60 mins per tech.
Time Slot	Recurring calendar block. Low-disruption time.
Status & SLA	Set appropriately for internal use. Escalate only if skipped too often.
Subtasks / Checklist	Course/cert name, time spent, applied skills, reflection, tie to tickets
Internal Notes / Template Text	Clearly define expectations. “Document 2 ways this course ties to recent work.”

TICKET HYGIENE = WORK HYGIENE

Training tickets should look and feel like client work tickets.
No shortcuts. No exceptions.

- Time entries are required.
- Notes should follow the same format as client-facing work.
- Use full ITIL lifecycle: status, time, category, reporting tags.
- You’re building a habit through sameness and repetition.

UTILIZATION & REPORTING

- Mark training time as billable (at \$0) to track W2 load costs.
- Differentiate internal training from external deliverables (client-facing education).
- Use dashboards to show team commitment and track hours per role.



HABIT TIMELINE

It takes at least 5 consistent weeks for a new behavior to feel “normal.”
Don’t expect culture shift after just 1 or 2 sessions.

- Habits require momentum.
- New hires should inherit the training cadence as a given.
- The goal is to make training so “baked in” that no one remembers when it wasn’t.