Learning Needs Analysis Discovery Template

This template helps identify performance gaps and determine whether training is the right solution.

When to use this template

- When stakeholders request "training" without clarity

- When performance outcomes are unclear

- Before designing courses or eLearning

- When deciding between training and non-training solutions

What this template helps you do

- Clarify business and performance problems

- Identify root causes of performance gaps

- Avoid unnecessary training solutions

- Recommend evidence-based interventions

> **Important**
>
> Completing this analysis does not always lead to training.
>
> In many cases, non-training solutions are more effective.

Business Context and Stakeholder Analysis

This section clarifies the business problem as described by stakeholders and establishes the organizational context for the analysis.

Stated Business Problem

How has the problem been described by stakeholders or subject matter experts?

Key Stakeholders

Stakeholder	Role / Interest	Influence Level

Business Impact of the Problem

What happens if this problem is not addressed?	Which business metrics or outcomes are affected

Target Audience and Learner Profile

This section clarifies the business problem as described by stakeholders and establishes the organizational context for the analysis.

Primary Learner Group

What is the primary role or job function of the target learners?

Experience and Background

What is their typical level of experience?	What relevant knowledge or skills do they already have?

Performance Context

Under what conditions do learners perform this task?

What constraints affect learner performance?

Motivation and Challenges

What motivates learners to perform well?

What common challenges or resistance exist?

Performance Gap Analysis

This section compares current and desired performance using observable, measurable behaviors.

Current State vs Desired State

Current State	Desired State

Description of the Performance Gap

Impact of the Performance Gap

Impact on quality

Impact on time or cost

Impact on risk or compliance

Root Cause Analysis and Solution Decision

This section identifies the underlying causes of the performance gap and determines whether training is an appropriate response.

Identified Root Causes

Knowledge gap (lack of information or understanding)

Skill gap (insufficient practice or proficiency)

Process or workflow issue

Tools, systems, or resource limitation

Motivation, incentives, or accountability issue

Explain why the selected causes are contributing to the performance gap.

Is Training the Right Solution?

Yes – Training is required

If yes, what behaviors or skills must learners practice or change?

No – Training alone will not solve this

What non-training interventions are required instead?

Recommended Solution and Learning Strategy

This section outlines the recommended response based on the analysis, including learning and non-learning components.

Recommended Solution Type

Training solution

Blended solution (training + non-training)

Non-training solution only

Further analysis required

Explain why this solution type is appropriate based on the analysis.

Learning Strategy (if training is recommended)

What behaviors or skills must learners practice?

What learning approach best supports this?

DELIVERY CONSIDERATIONS

Delivery and Modality Considerations

Constraints, Risks, and Opportunities

This section identifies factors that may limit or enhance the effectiveness of the recommended solution.

Constraints

Constraints and Limitations

Risks to Implementation

Risk description	Likelihood	Mitigation

OPPORTUNITIES

Opportunities and Enablers

Analysis Summary and Next Steps

This section summarizes key findings and outlines recommended next steps following the needs analysis.

Key Findings Summary

Key findings

RECOMMENDATION SUMMARY

Recommended Actions

NEXT STEPS & OWNERSHIP

Next Steps

Risk description	Likelihood	Mitigation

VALIDATION & SIGN-OFF

Validation and Sign-off

Analysis completed by:	Reviewed / approved by:
Date:	Comments: