Needs Assessment Tip Sheet

**Introduction:**

A needs assessment is the process for determining if training is necessary. A thorough needs assessment analyzes organizational resources and goals, departmental performance goals, and individual performance history and needs. Completing this worksheet will help to identify training needs and objectives*.*

**Factors that suggest training may be necessary:**

* Lack of basic skills
* Poor performance
* New technology
* Customer requests
* New products
* New jobs
* Business growth

**A needs assessment will determine:**

* What trainees need to learn
* Who receives training
* Type of training
* Frequency of training
* Buy a training program (external) vs. build a training program (internal)
* Training vs. other employment decisions (i.e., job redesign, hiring those who already possess the skills desired, etc.)

**Part 1 - Department Analysis**

Managers will need to determine first if training is appropriate, and second, which employees need training.

**Part 2 - Identify Employee Readiness**

To determine an employee’s readiness for training, ask the following questions:

1. Do the employees have the personal characteristics (i.e., the ability, attitudes, beliefs, and motivation) necessary to learn and apply training content?
   1. An employee’s motivation to learn can be enhanced by communicating the potential job-related, personal, and career benefits expected through participation in the training program
   2. An awareness of skill strengths and weaknesses are also needed for employees to be motivated to learn. Knowledge of the link between the training program and an improvement in their weaknesses will enhance motivation
2. Will the work environment facilitate learning and not interfere with performance? To ensure the work environment is equipped for training effectiveness:
   1. Provide materials and other work aids necessary for employees to use new skills
   2. Give employees time to practices and apply new skills or behaviors to their work
   3. Offer positive feedback when employees apply the training content

**Part 3 - Determine Training Resources**

It is necessary to identify whether the company has the budget, time, and expertise for training. Should you hire external consultants, which may be more costly, but may help you to achieve desired results? Or would it be best for you to develop and facilitate your own training program in-house?

**Part 4 - Getting Company Support**

Once it is decided that training is necessary, managerial support for training is critical. Key factors to success in this regard are:

* Positive attitude among peers and mangers about participating in training activities
* Managers’ and peers’ willingness to inform trainees how they can effectively apply training skills to their job
* Providing opportunities for trainees to use training content on the job

**Part 5 - Target Training Content:**

Training must be designed to fit the differing needs of the learners. Find out what you can about the employees in order to effectively communicate with them. By talking to the Department Manager, gather information regarding the employees’ preferred learning activities. Preferred learning activities will depend on how the employees learn best (i.e., from visual, auditory, or hands-on experiences). More than likely, a combination of various learning styles will need to be incorporated into the training program so that learners get the most out of the program.

When determining the content of the training program, it is necessary to gather essential knowledge and skills necessary for each employee within the department to perform successfully.

Below is an example of training content and goals for a sales department:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Job Position** | **Required Topics** | **Frequency** | **Training Methods** | **Other Resources Available** |
| Sales | Product sales and techniques | Monthly | Lecture, classes | Literature, Company handbook |
|  |  |  |  |  |

**Part 6 - Financial Considerations and Other Comments:**

This section is meant for comments about budget, recordkeeping processes, or other comments or plans you may have. The data collected will be used as a basis for the rest of the developmental process. These results will help you to identify future needs, areas of improvement, and materials that may be needed.