

Needs Analysis Questions



Purpose:

This document provides consulting questions and best practices that can enhance your analysis conversation with your Learning and Development (L&D) and business partners

Consulting Questions

In your conversation, ensure you use language that a business partner will understand. Rephrase typical language used within L&D/HR for example, instead of “What are your performance gaps?” ask: “What is the employee doing, what should the employee be doing, or describe what it looks like when you see someone doing it right?”

Overall Consulting

- How did you identify the problem or need? What happened that made you think you need training?
- Why is the organization implementing this change?
- What federal regulations or rules are we attempting to address?
- What initial documentation do we have that provides the background behind the request?
- What are employees doing or saying that prompted this request for L&D support
- How are employees currently performing at their job responsibilities
- Describe what you want employees to do differently? (What does right or correct look like?)
- What are the consequences of employees not performing to the business’ standards?
- When should an employee escalate an issue?
- What is the overall goal for employees who complete this training (situation)?
 - What do we want them to do differently after completing the training?
 - Are we trying to reduce risk?
 - What are the issues or challenges in this area or is there an opportunity to improve?

- How will you measure if the learning solution(s) helped the employee achieve the stated goal?
- What reporting exists to help us understand what may be contributing to the issue? May I have a copy of the report?
- What is working with the existing program?
- What opportunities do you see?
- What will success look like? How can we measure it?
- What time requirements (due date) are associated with this request?
 - When is the delivery date?
 - When are any learning solutions or milestones or milestones expected?

Audience

- What division or department does the audience belong?
- What is the job function of this audience?
- What is the total number of employees participating in training?
- What is the experience level of the audience?
- Does the audience already know how or what to do?
- Is the problem performance related? If so,
 - What is the performance discrepancy?
 - Is it a skill deficiency?
- What other factors affect performance in the tasks they complete?
- What do you need or want to change?
- How will training change the way things are being done?
- What other areas are impacted by this training (outside of performance issues)?
- Where is the audience located (geographically)?
- Any language considerations?
- Are there any assignment or third – party concerns?
- Why is the training important to the audience (What is in it for me (WIFM))?

Desire to perform

- Do employees have the:
 - Desire to perform their job well.
 - Competence to perform well in the job.
 - Confidence to perform in the job well.
- What motivates employees to perform better in their role?
- What is keeping them from performing successfully?
- Are the right people recruited and selected for the job to match the realities of the work situation?

Expectations and Feedback

- May I have a copy of the performance standards or expectations (important for new hire training program)
- Are employees aware of the standards and expectations for their performance?
- What performance gaps are most severe? (Target these as priority).
- Do employees believe the standards and expectations are attainable?
- Do employees understand the various aspects of their roles and the priorities for doing them? How do you confirm their understanding?
- Do employees receive relevant, clear, understandable, and timely feedback?

Incentives and Consequences

- How is good employee performance rewarded and recognized?
- What punishes people for doing it
- Are meaningful incentives available for satisfactory performance?
- Are there negative consequences for doing the task or job right?
- Are there hidden rewards for poor performance?
- Are there clear consequences for poor performance?
- Are the consequences aligned to support desired performance?
- Are consequences timely?
- Are career development opportunities provided?
- Do employees believe they have an opportunity to succeed?
- Do measurement and reporting system track appropriate activities and results?
- How do employees view the work environment (for example, is it positive or negative)?

Skill and Knowledge

- Do employees have adequate skills and knowledge to do the job? (If their life depended on it, could the employee on the job)?
- Do employees understand how their roles impact the goals and performance of the organization?
- Does the current training prepare your employees to perform their job as expected?
- Do employees have enough experience to learn the new skills required for the job? (What prerequisites might we need to consider?)
- Ensure employees understand what is expected of them to succeed in their roles.
- Are the most qualified candidates being hired for the job?).

Tools, Resources, Time, and Materials

- Do employees lack the:
 - Authority to do the job well?
 - Time to do the job well?
 - Necessary aptitude or personality to be effective in the job role?
 - Tools or equipment to do the job well?
 - Information to do the job well (for example, policies and procedures)?
- Are the job procedures and workflow logical?
 - How stable are they?
 - Who updates them when needed and is it timely?
- How does the work environment enable or support the desired employee performance you (the business) need to meet your goals?
- Is the work environment structured in a way that enables employees to perform at their best?
- Systems:
 - How many systems do employees use to perform the job today?
 - How difficult is each system to use?
- Is it user friendly and intuitive?
- How stable is each system? How frequently do screens change?
- Do training systems, test environment, or account exist?
- How do employees learn to use the system(s) today?
- Do good models of employees performing successfully exist to help new or struggling employees? What does that look like?
- What have you tried already?
- Which tasks are the most expensive or costly when done incorrectly?
- Which tasks require the most skill practice?
- What tasks are better suited for environmental support vs structured training?

Common Challenges

The partner does not know the business impact of the problem. Ask:

- How are employees currently doing their job?
- What is it they are doing/saying that led to this request?
- How do you evaluate and measure your employees' performance today?
- If you look at the matrix from your team one year from now, how could you tell whether the problem was solved?

Tip: We can suggest system controls when training is not the solution.

The partner just wants people to be aware of something. Ask:

- Once all your team is aware, what change, or difference do you hope to see? (What are they supposed to do with this understanding?)
- How can we tell or measure if someone is aware?
- How will an employee's performance differ from someone who is unaware?
- How will this difference affect the customer, team, and organization?
- Are the regulators concerned about dates and history? (If so, why?)
- What behaviors need to improve based on the regulatory requirements?

Tip: Our job is to direct partners to what's right for the learner, not a check the box for regulators.

The partner has a goal they think cannot be measured. Ask:

- How did you identify the problem or need?
- How will you know whether the solution contributed toward solving the problem or need? What will you see?
- What are you measuring now that may be tied to this project?

The Partner says there is nothing to measure because the product or policy is new. Ask:

- Why was the new process, policy, or product created?
- What controls are in place?
- Then, look for ways to measure that.

Tip: If they are reluctant to provide performance data, ask leaders to reinforce the benefits of sharing what data they can.