EMERGING STRONGER Together

Needs Analysis

Drive better business value through smarter up front conversations.

This tool works best when used in conjunction with the other tools in this series

1. **Needs Analysis Tool**
2. Curation Decision Tool
3. Communication Plan Launch Tool
4. The Power Hour Tool
5. Improving Impact Tool
6. Power Hour Tool
7. Improving Impact Tool
8. Team Skills Mapping Tool
9. L&D Skills Prioritizer Tool
10. Change Journey Planner

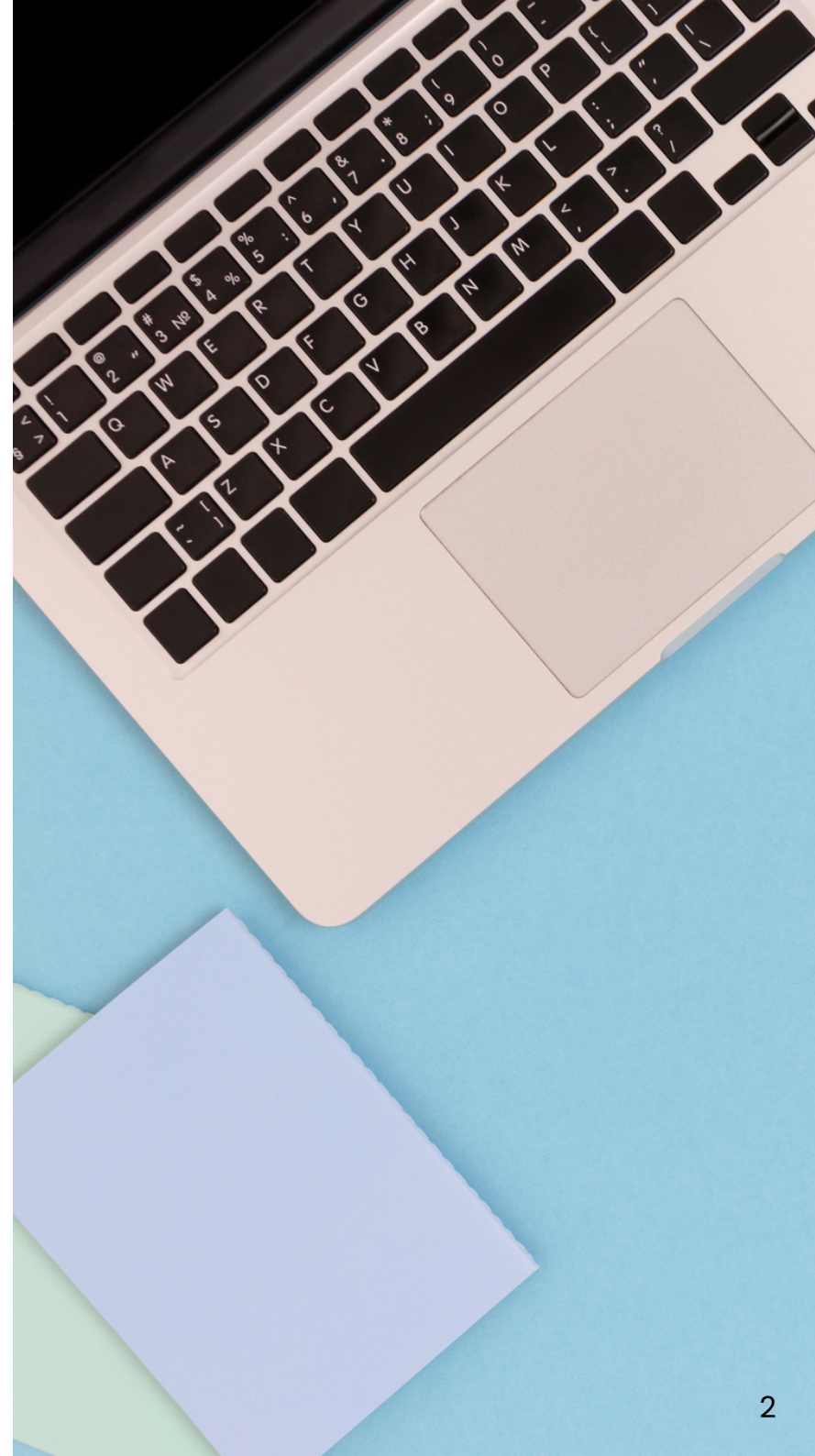**Shannon Tipton**
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Needs Analysis Tool | © 2023 Emerging Stronger

Introduction

If you want to make sure your courses and content add the most value, make sure they address the real underlying problem. In reality, sometimes they don't. Just because someone asks for training, it doesn't mean that training is the best thing for them. That's where this needs analysis conversation guide and process can really help. Ultimately the direction of the first conversation you have will determine the value you can add. This tool helps you to have smarter up front conversations to save you time, and target attention and effort to what matters most.

A key concept underlying this tool is that the purpose of a learning solution in an organization is to bring about change. Your solution should help people to change behavior in a way that benefits your organization and people. By using this tool to conduct a robust needs analysis your organization will see improvements in areas such as:

- Alignment of learning solutions to business needs
- Early buy in leading to greater support to apply training in the workplace
- Behavioral change as a result of learning solutions
- Performance impact of learning solutions

Who is this tool for?

Anyone within an organization responsible for providing learning solutions. This tool offers a simple, powerful process for those who want to add value in a limited period of time. It is especially useful for those newer to learning roles.

For those who would like to explore more advanced analysis tools refer to the list provided at the end of this tool.

When to use this tool?

Use this tool to have an initial conversation to understand the real need when you:

- ✓ receive a request for a course or content
- ✓ are engaged to support a business project or change
- ✓ identify a performance issue or opportunity in the business

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This tool will help you:

1. Invite and engage stakeholders to analyze a need with you

2. Ask questions and uncover data to understand the performance

3. Identify the target audience and what behaviors they must adopt

4. Clarify the best levers to drive behavior change (knowledge, skills, motivation or environment)

5. Determine whether a learning solution is required

6. Shape the design of learning solutions to achieve impact

How to use this tool

Use this tool to guide a 20-30 minute conversation with someone requesting your support with a course, business project or change. Capture outputs in the template during this conversation. After your conversation, improve upon your draft by identifying assumptions or statements to test with others. Seek supporting data and have further conversations with relevant people to refine and finalize your needs analysis.

This tool should be used before you start designing a solution. Depending on the solution you identify as appropriate you may want to follow it with another tool from this toolkit (e.g. Curation Decision Tool).

Step 1	Business needs

a. Start the conversation
b. Identify business benefits
c. Define success
d. Gather data

Step 2	Audience needs

a. Identify target groups
b. Define actions to be taken by group
c. Describe group
d. Identify limiting factors
e. Determine if a learning solution will help

This tool provides guidance notes for each part of the conversation, including conversation starters/prompters. These notes are followed by a template to record output. A worked example is provided to show you what a completed template might look like.

Read through this tool fully before using it for the first time. Feel free to refer to the guidance notes during your conversation.

Step 1.
Business needs

a. Start the conversation

Invite the person requesting your help to explore the need with you. Do this by asking a simple question such as:

- Can we please take a little time so I can understand what you want to achieve with this program?
- Do you have time to answer a few questions to help me understand how to deliver a solution that will meet your needs?

b. Identify business benefits

Identify the business problem or opportunity that needs to be addressed. Ask questions such as:

- How will you know if this project / program has been successful?
- What problem are you trying to solve?

A useful follow up question if they have difficulty clearly defining business benefits or focus on learning objectives is "And what will that give you?" Ask this as many times as you need to get to business benefits.

Step 1.
Business needs

c. **Define success**

For each benefit describe what will be different as a result of the solution. Guide the conversation to business outcomes and benefits - refer to table 1 for examples. If possible identify relevant business metrics and agree a target. Ask questions such as:

- How do you currently measure that?
- Would you expect that metric to go up or down if we solve this problem? By how much?

It can be difficult to isolate the impact of your solution from other factors. Don't let that put you off – monitoring business metrics gives you feedback that can be used to explore what is happening in the business and why.

d. **Gather data**

Gather data on existing performance against metrics.

Table 1. Sample business benefits and metrics	
Benefit	**Metric and Target**
Improved Safety	Reduce number of injuries per year by 25%
Reduced Staff Turnover	Reduce staff turnover by 20%

Step 1.
Business needs

Worked Example

Business problem or opportunity.
Describe the business problem or opportunity that needs to be addressed.

> Our organization manufactures and distributes packaged foods with a limited shelf life. There has been an increase in wastage due to product not meeting quality standards after manufacture. There was also a recent product recall from some of our distributor warehouses.

Business benefits.
Describe the outcomes or benefits of successfully addressing the business problem or opportunity.

Benefit	Success Indicator / Metric	Current Performance Data	Target Performance
Reduced product wastage	Production wastage	$2m annually	$500k annually
Protect product and brand reputation	Consumer Net Promoter Score	NPS – 8	No reduction in NPS due to product safety concerns
Avoid fines and legal fees associated with breaching food safety regulations	Fines	$1.5m in past year	Six months without any fines in 1 year's time

Step 1.
Business needs

Business problem or opportunity.
Describe the business problem or opportunity that needs to be addressed.

Business benefits.
Describe the outcomes or benefits of successfully addressing the business problem or opportunity.

Benefit	Success Indicator / Metric	Current Performance Data	Target Performance

Step 2.
Audience needs

a.	Identify target groups

Identify the group(s) of people whose behavior needs to change in order to achieve the business outcome / benefits you defined in step 1. Ask questions such as:

- Which roles or groups are in the best position to influence the outcome?
- If you could change the current behavior of one role or group to achieve the best results, which would you choose?

Your target group(s) might be everyone in a specific role, set of roles or function in your workforce. For example:

- Frontline leaders
- Senior leaders
- Contact center
- Production line workers
- All new starters

Use the 80/20 rule to identify the group(s) whose behavior will have the biggest impact on achieving the outcome. This will help you to focus your effort.

Step 2.
Audience needs

b. Define actions

For each group describe the actions they should take in order to achieve the business outcome. Stating this clearly and specifically will improve the relevance and impact of the solution. Ask questions such as:

- If you were to watch someone from this group in the workplace what do you want to actually see them doing?
- What do you want people in this group to do that is new or different to what they do today?

Write a clear statement – or a short list of statements – about what they should be able to DO IN THE WORKPLACE. Ensure that each starts with a verb. The table below gives poor and better examples of action statements.

Table 2. Action statement example

Poor Example	Better Example
Appreciate what makes a meeting successful	Chair a successful meeting
Explain how to ask good questions in a sales call	Ask probing questions in a sales call to identify customer needs
Understand anti-discrimination law	Select people for promotion in a way that complies with anti-discrimination law
Describe the settings on the production line equipment	Set up the production line to efficiently produce a batch of XYZ as per product specifications

Step 2.
Audience needs

c.	**Describe group**

Describe the characteristics of each group that are relevant to the actions they should take or to the design of a solution. See the worked example on page 15 for more detail on "characteristics".

d.	**Identify limiting factors**

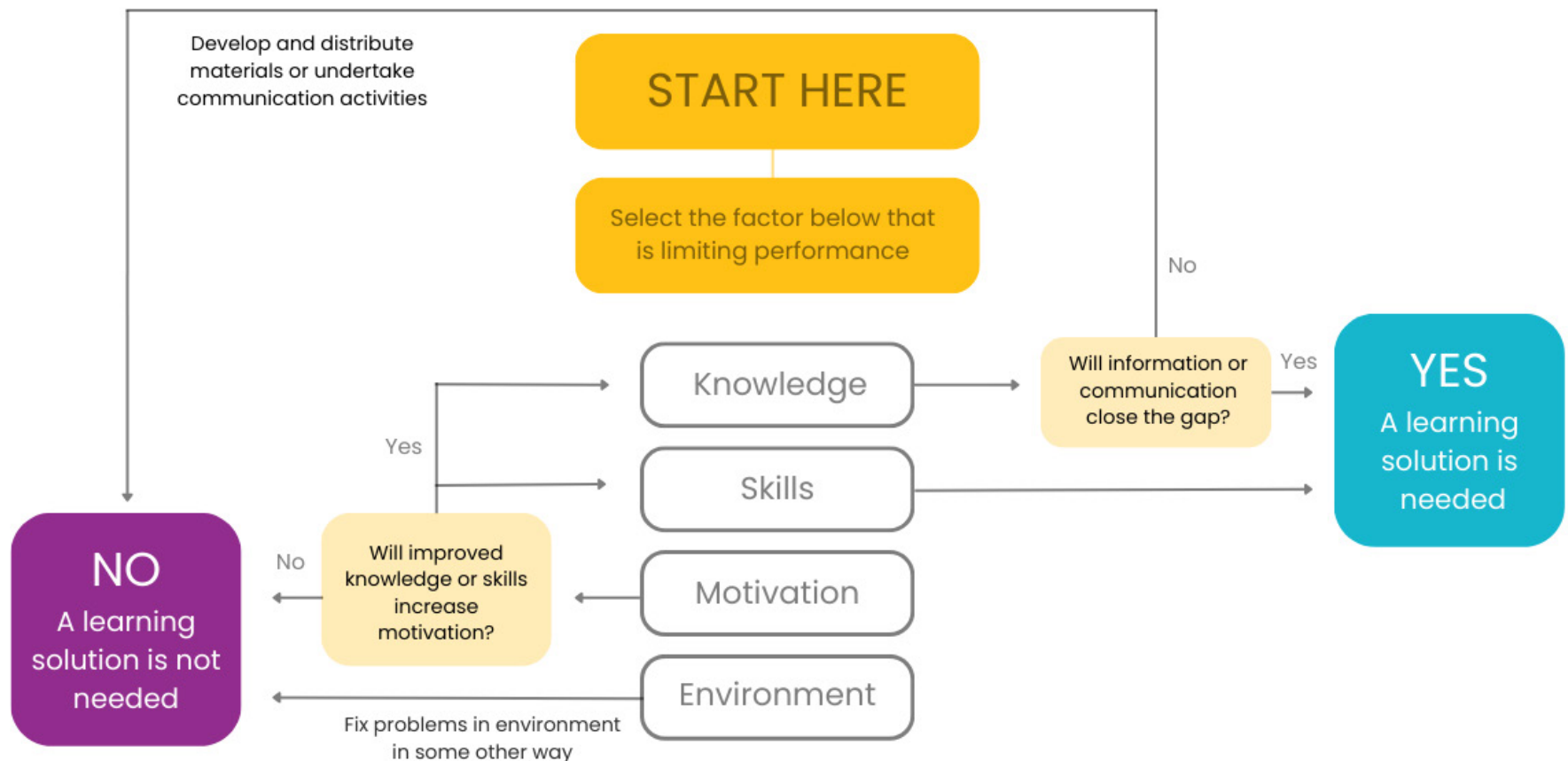Identify what is preventing each group from taking these actions now. You could start by saying:

" Let's look at each of these actions and identify what are the key factors that need to change so they can take these actions: knowledge, skills, motivation or environment."

- Knowledge – They don't know enough
- Skills – They aren't able to do it or need more practice to do it well
- Motivation – They don't care enough about it, or don't think they can do it even if they want to
- Environment – The systems, processes, tools, technology, how they are managed or something else in their environment doesn't support them to do it

Step 2.
Audience needs

e. Determine if a learning solution will help them

A learning solution will develop knowledge and skills. If there are factors in the environment preventing a group from taking required actions then they will need to be addressed instead of, or in addition to, a learning solution. Use this decision tree to determine whether a learning solution is needed.

Develop and distribute materials or undertake communication activities

START HERE

Select the factor below that is limiting performance

No

Knowledge

Skills

Motivation

Environment

Will information or communication close the gap?

Yes

YES
A learning solution is needed

Yes

NO
A learning solution is not needed

No

Will improved knowledge or skills increase motivation?

Fix problems in environment in some other way

Step 2.
Audience needs

Whose behavior needs to change in order to achieve business outcome / benefits? How? What are their key characteristics? Will learning help them to do it?

Worked Example

Identify		Target group 1 - Production Line Workers	Target group 2 - Production Line Leaders	Target group 3
What they need to do (ACTIONS they can take IN THE WORKPLACE)		Follow all food safety regulations on production floor. Perform in-line quality checks as per specifications.	Role model food safety behaviours. Do spot-checks on production line workers doing in-line quality checks.	
Relevant Characteristics (e.g. experience, work environment and patterns, demographics)		Shift workers, paid by hour plus a bonus scheme based on production quantity. Low turnover. High proportion with English as a second language. Literacy issues.	A lot are new to role (<6 months in role). Have knowledge of production process, but limited hands-on skill. Spend a lot of time in meetings.	
Limiting Factors	Knowledge	N/A	Yes – of the impact of leader behavior on food safety	
	Skills	N/A	Yes – to be able to do in-line quality checks so they can supervise them better	
	Motivation	Bonus scheme incentivizes quantity over quality.	N/A	
	Environment	Increased overtime due to increased sales may be impacting attention.	Need to get leaders on the production floor more.	
Will a learning solution help them?		Maybe - annual refresher training hasn't been updated for 3 years so there may be benefit to refreshing it. Motivation and environment need to be addressed.	Yes	

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Step 2.
Audience needs

Whose behavior needs to change in order to achieve business outcome / benefits? How? What are their key characteristics? Will learning help them to do it?

Identify		Target group 1	Target group 2	Target group 3
What they need to do (ACTIONS they can take IN THE WORKPLACE)				
Relevant Characteristics (e.g. experience, work environment and patterns, demographics)				
Limiting Factors	Knowledge			
	Skills			
	Motivation			
	Environment			
Will a learning solution help them?				

Advanced Resources

If you found this tool useful and would like to take needs analysis further by digging into more detailed analysis methods we recommend looking at:

- Action Mapping process by Cathy Moore
  https://blog.cathy-moore.com/action-mapping-a-visual-approach-to-training-design/
  Guidance on writing action statements in Step 2 of our Needs Analysis tool draws upon Action Mapping as an information source.

- Will Training Help? Flowchart by Cathy Moore
  https://s3.amazonaws.com/cathymooremedia/will-training-help-A4.pdf
  This flowchart has been used as an information source for the simpler decision tree in Step 2 of our needs analysis tool.

- Performance Consulting process by Nigel Harrisson
  https://performconsult.co.uk/what-is-performance-consulting/

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