

Needs Analysis

Rationale:

All too often we assume the need for training, so we skip the needs analysis and design phases to go right to development and execution. However, there are many reasons why gaps in performance exist; limited knowledge or skill is only one possibility. Without understanding specific business or individual needs and what the performance gaps are, we may not know if learning is even needed. Achieving the right results starts with asking the right questions so you uncover the right problem to solve.

A little planning goes a long way! The Needs Analysis is the critical first step to ensure enablement solutions meet our sellers' needs. Whether it is to introduce new information to sellers, help sellers begin practicing new skills for the first time, reskill or upskill our sellers, a Needs Analysis will help us develop high impact, learner-centric enablement and learning solutions that support performance and business objectives.

How:

This worksheet will assist you in gathering essential data you need to clarify the performance need, set clear goals with sponsors, and begin early planning for design and evaluation. It will help you define objectives with your Sponsors and SMEs; gather and review existing solutions that may be leveraged; and plan the scope of development and evaluation for enablement solutions.

This document is a working document intended to guide you as you start scoping an enablement request and is not recommended to be sent to the Requestor for completion; it will serve you to kickoff potential enablement initiatives.

The Discovery Phase

Gather data to determine expected business results and individual skills and behaviors that lead to those business results. Compare expected state to current state. NOTE this is not just KPIs, it's actionable, measurable, demonstratable tasks or behaviors.

*Requestor:	
WWSE team member completing this:	
Initial Request Date:	Target date for solution implementation:

*If Requestor is not from the Target audience, it's important to gather information from the requestor and validate this potential need with representatives of the audience community.

Step 1: Identify the problem (The goal of this part of the meeting is to start asking questions of the requestor as well as whoever will be representing the voice of sales)	
What's the goal?	
What do sellers have to do to reach it?	
What is happening right now?	
What is gap between current performance and goal?	
Step 2: Identify why the problem is occurring (The goal of this part of the meeting is to gather data and ideas as to what the root cause could be. It could be boiled down to 1 or 2 of these domains, it might be all 4. Deciding on which domain(s) is the root will help you determine the best fit solution.)	
Motivation:	
How well does seller know expectation for task or behavior?	
To what extent does seller have interest and potential to complete the task or change the behavior?	
What are the rewards and/or consequences to complete task and/or change behavior?	
Environment:	
Are there tools that can make doing this task or behavior easier?	
Does seller have resources they need to complete task or change behavior?	
What structural or operational challenges might make it hard for seller to complete task or change behavior?	
Knowledge:	
Is seller aware of new information that might more readily allow them to complete task or change behavior?	
Is the information stored and readily accessible where the seller needs it?	

Is the seller able to recall information when they need it?	
Skills:	
Have we demonstrated what success for this task or behavior looks like?	
How will seller practice task or behavior? Who will provide feedback?	
What are plans to keep skills or behavior refreshed?	
Step 3: Plan to Close Gap (Use this area to synthesize the gap analysis from Steps 1 and 2)	
In which of the following domains did you determine there's a performance gap and how do recommend addressing it?	
Motivation:	
Environment:	
Knowledge:	
Skills:	

Use step 3 to synthesize and plan recommendations for enablement solution(s) design and evaluation. Write up your recommendations and present them to project Sponsor to meet business and learner goals.

- For low-complexity initiatives (e.g., one new task), you may have what you need to plan your design and measurement recommendation prior to solution development.
- For higher-complexity initiatives (e.g., behavioral change, iterative skill-building over time, skill correction for poor performance), you will need to progress to a solution design conversation with your Instructional Designer in order to determine your approach.

Proceed when you know (1) the gap between what performance is expected and current state performance, and (2) to what extent gap exists due to limited knowledge and skills. You can then begin planning design and evaluation for your solution(s).