

How to Analyze and Address Your Organization's Learning Needs

By Fina Shipley and Pat Golden

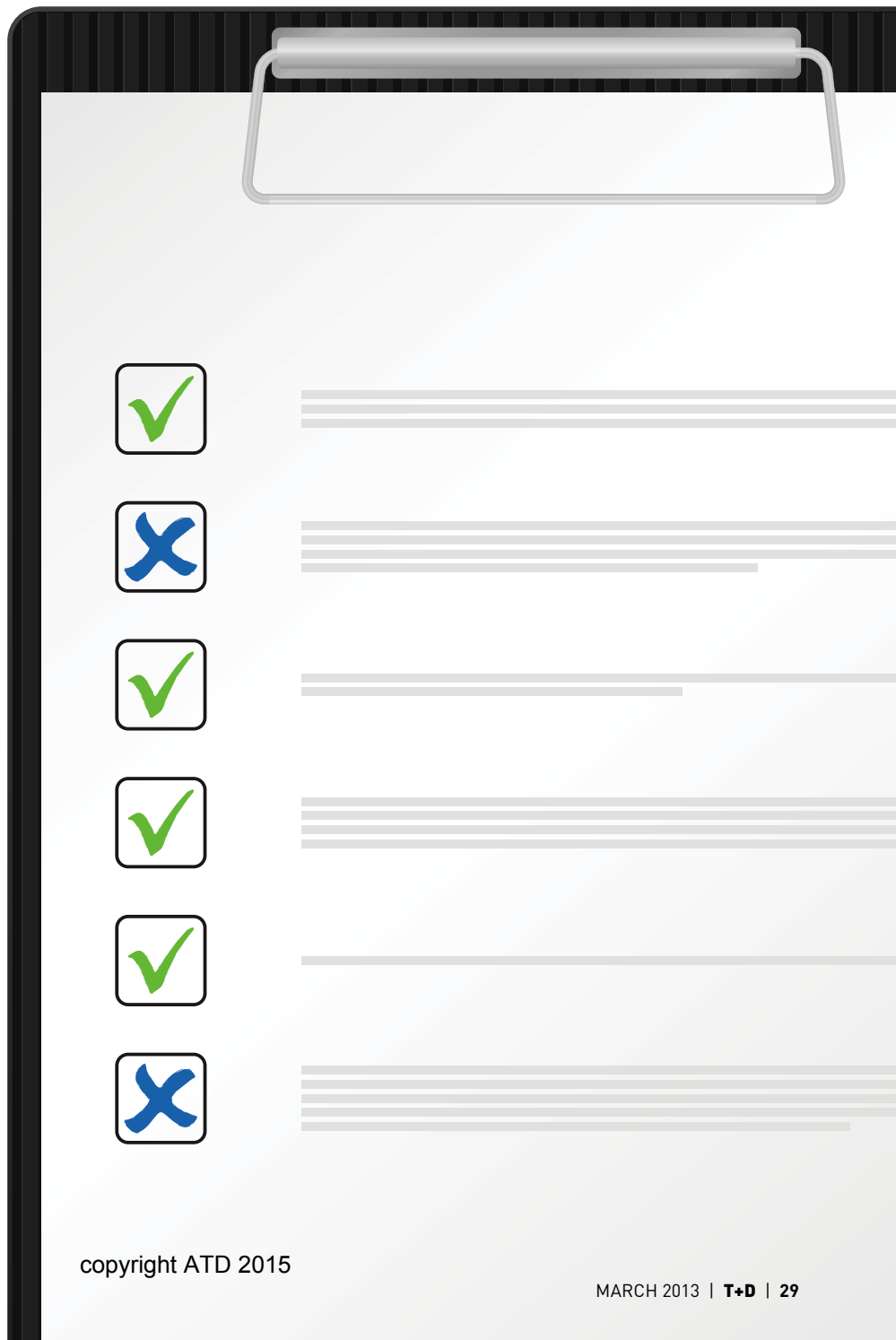
As training and development professionals we realize that training is not a cure-all, so we shouldn't say yes to all training requests. But how do we determine when to say no?

Training departments exist to ensure that employees have the knowledge and skills they need to do their jobs well. Training professionals can and should only close gaps that are clearly learning related.

You might think that this is stating the obvious, but you may be surprised to hear that, on average, half of training requests are anything but learning related. It is part of our job as training professionals to weed out these invalid requests. Attempting to resolve a non-learning-related issue will cost resources and frustration—roll out as many classes and assign as many coaching sessions as you can, but the problem will remain unresolved.

For example, suppose an employee is having difficulties meeting sales quotas for a product line. His manager voices concern to the training department and asks that the employee receive a refresher course on product line operations. The department grants the request and provides him with intensive coaching. However, a month later, the manager finds himself with the same issue. So what's the problem?

As it turns out, the cause was not learning related. If the training department had



spent time understanding the root of the issue, it would have determined that the problem was not due to the absence of knowledge, but rather a lack of motivation—something that cannot be resolved by a training initiative.

When there is a gap in performance, training almost always is viewed as a solution. However, it may not be the remedy. Conducting a training needs analysis (TNA) is the best way to determine which training requests are valid and which are not.

Establish a process and guidelines

The first step in TNA is to build a process for determining training needs on a regular basis. To ensure consistency when gathering information, develop a written guide for all of the members of your department to use. Ask the same questions of everyone who requests training and of those who you think require a learning initiative.

TNA should be done both proactively and reactively and is most effective when aligned with the corporate strategy. This helps to identify the types of learning programs needed for a given period based on overall company needs.

Set performance expectations

Establish performance expectations by identifying the knowledge and skills your organization needs to successfully execute on the corporate strategy. Conducting a skills inventory can be as simple as identifying both current and desired skills. The purpose of such an inventory is to establish a benchmark and get an idea of what your organization expects from its employees in terms of performance.

Ask managers what is the desired performance of their teams and compare it with the actual performance that they observe. Disconnects or performance gaps between desired and actual performance will be revealed, highlighting the shortcomings in performance expectations.

Isolate the gaps

Once you have pinpointed performance gaps, determine if those gaps can be

resolved through a training initiative.

Below are steps to take and questions to ask during TNA to help identify which gaps training can close.

Is the observed problem apparent in one or more individuals? If you observe the problem in only one individual, then investigate further to rule out poor performance as a result of another issue (such as a lack of personal motivation in the previous example).

- Is the gap associated with productivity or delays?
- Is the gap associated with absenteeism or tardiness?
- Is the gap associated with complaints from internal customers or peers?

Is the problem due to work environment conditions? Evaluate whether the environment contributes to the issue.

- Do your direct reports have all of the tools they need to successfully deliver the desired level of performance?
- Do your direct reports have access to user-friendly reference materials or job aids to help them deliver the desired level of performance?
- Can the work environment of your direct reports be improved? If yes, how?
- Can you identify any work-related obstacles? If yes, what are they?

Have you discussed the problem with your direct reports? If, for example, your organization recently introduced changes, your direct reports may need time to adjust to these changes.

Prioritize needs

Depending on the size and complexity of your organization, you may find yourself with a handful of valid training requests. The challenge at this point is to categorize which requests must be addressed immediately and which can be deferred. The problem lies in having several critical valid training requests.

If your organization has finite resources, you will have to figure out a way to objectively set priorities. Here are some questions to guide your conversation during TNA to help you make decisions.

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Which business units, projects, programs, and initiatives are affected? It is important to focus on high-priority initiatives that will have a business impact.

How many employees are affected? Numbers count. It is easier to justify launching a training program for an entire business unit rather than a few individuals.

When must the training be launched? Always ask for the latest train-by date, and never second guess. The worst outcome is for you to delay training.

Is the training initiative for a product or service, and is it new or existing? New training requires more preparation than a program that already has been launched. The requirements may be as simple as developing presentation slides or as complex as building an entire curriculum.

Are they open to alternative solutions? If you face multiple priorities on a regular basis, be creative in generating solutions. Classroom training isn't always the most sustainable solution, or the most cost effective. You can, for example, vary the solution: Assign classroom training to one group, assign self-paced learning using off-the-shelf materials to another, and assign a virtual session with subject matter experts to a third.

What do you expect to get out of these training sessions? It is important to manage expectations and set clear goals to ensure that the training meets the needs.

Develop a plan

As mentioned earlier, when prioritizing, big requests almost always trump individual needs. Create an individual development plan (IDP) to ensure that individuals are still able to acquire the knowledge and skills they need.

Managers should work closely with their direct reports and together set realistic quarterly objectives in the form of development tasks. For example, to upgrade knowledge on a technical skill, the employee could receive coaching from a subject matter expert.

Although coaching can take place anytime, the IDP provides a structured avenue with clear expectations. It also is demand-driven and allows employees to creatively construct plans to fill gaps and ensure continuous learning. Other examples of IDP tasks include

- participating in online learning programs and on-the-job training

- completing special projects
- receiving coaching or enlisting a mentor
- conducting research by reading or authoring whitepapers
- attending seminars, webinars, and conferences
- enrolling in a certification program or university program.

The training department must ensure that all employees maintain their IDPs, together with their managers. The list of development tasks should be compiled and tracked. For example, if several employees want to learn a particular skill, then this request no longer is an individual need and warrants a group learning initiative.

Once you have the results of your TNA and have finalized the IDPs, align the two processes to prioritize and strategize appropriate programs that address valid training requests.

Know when to say no

By following these steps, you can identify which training requests truly are learning related—and only then attempt to resolve the issues. This ensures that your team will correctly allocate resources, reduce frustration, and successfully execute training programs. For all other requests, just say no.

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