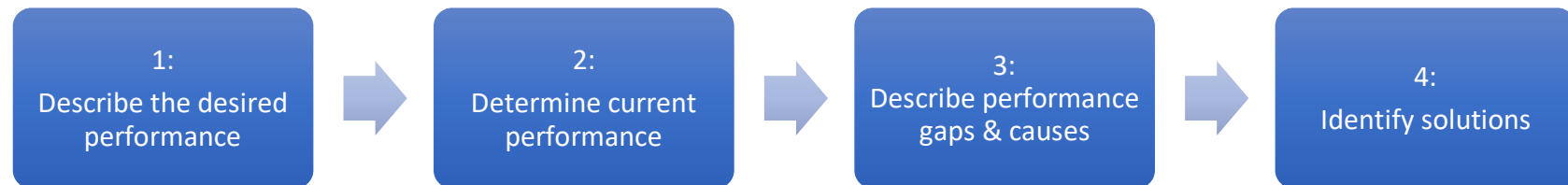




Needs Analysis Process

A **needs analysis** is a systematic process to determine the gap or discrepancy between a present state (what is) and a desired state (what should be). The starting point is always to (1) clearly identify the performance expectations (the desired state). Then (2) determine if there is a gap in performance (a gap in meeting that expectation), then (3) what factors cause the gap or influence the performance and finally (4) what is the most effective and sustainable method to close the gap Whether training or other interventions or a combination of supports. As you will see, the process is meant to provide balanced solutions to improving performance.

Four phases on a Needs Analysis:



1: Describe Desired Performance

The starting point is to clearly describe the desired state of performance (optimal). In short it is to determine what skills, knowledge, and attitudes are needed to perform the task or job effectively, and what other non-training factors contribute.

STEP 1: Describe the target group (supervisors, activity leads, HVAC technicians, etc)

STEP 2: Describe the desired performance/behaviors (use actionable terms)

STEP 3: Describe regulatory requirements that determine the need for training (if applicable)

STEP 4: Describe program or business expectations for performance

The purpose, at this point, is to gather information that allows you and your team to describe the desired performance/behaviors specific to the project. You want to use performance-based terms and phrases to describe the performance expectations, and you want to get concurrence from program owners, or management to make sure that they are in agreement.

2: Describe Current performance (current state)

Once your team has described the desired performance (and you have concurrence from management, key stakeholders), the next step is to determine what the actual performance is (in the workplace). This is commonly achieved by performing one or more of the following:

- Interviewing subject matter experts
- Interviewing supervisors to determine current performance from their perspective
- Observing work (or work outputs) of representatives of target audience
- Reviewing relevant self-assessments, reports, lessons learned, near misses, etc, for understanding performance from these available sources.

3: Describe performance gaps and causes

Now that your team has a clear picture of the performance expectations and the current state of performance it's time to describe the gaps and determine causes.

We use the six boxes model to determine and tease out factors that affect performance, or inversely factors that would improve performance. We use Carl Binder Six Boxes model either within our team or when possible with a group including SME as a white board exercise: <https://www.sixboxes.com/Six-Boxes-Model.html>

1: Expectations & Feedback	2: Tools / Resources / Environment	3: Consequences & incentives
4: Skills & Knowledge	5: Selection & Assignment	6: Motives & Preference

4: Recommend Actions

After the team has thought through potential causes for why there is a performance gap, it is time to form a bridge from analysis to action. This step determines “what needs are most critical” and “what are possible solutions.” It is important to include all of the non-training factors that impede performance so that training is positioned alongside other interventions emphasizing the complimentary and related dependencies that form the recommended solution.

Challenge here can be that the client, who expected that they were just going to get training is now understanding that training (if applicable) is only one factor. We often package our solutions with just-in-time supports, but if we also find for example the need for setting expectations and providing feedback as a considerable weight in the equation that will require broadening the scope of the project. This is commonly where friction arises when the client learns that they have to put in greater effort.

5: Prepare a recommendation report:

After the solutions have been identified and prioritized, the last step is to produce a report. This includes the following:

- Description of the needs analysis process
- Major outcomes identified
- Prioritized needs (and criteria used)
- Action plan recommendations