



TRAINING NEEDS ANALYSIS TEMPLATE

A quick reference guide for training needs assessment and analysis.



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Developing a training program has always demanded a serious investment, so the overarching goal of a needs assessment is to give a credible estimate if these investments will pay off and make sure that learning can solve the problem.

This template will provide you with spreadsheets that will help you to effectively conduct a needs analysis even if you're doing it for the first time in your life.

But first things first: let's recap what steps a training needs analysis should include and the essential questions to ask at each step.

Step 1. Analyze the present situation

Question to Consider	Your answer
What is going on now?	
How are employees performing?	
What results are being achieved?	
How are customers affected by this situation?	

Step 2. Identify business and performance goals

Question to Consider	Your answer
What is our goal?	
What should be happening?	
How do managers want employees to perform?	
How wide is the gap between the present situation and the desired outcome?	

Step 3. Trace a root cause

Question to Consider	Your answer
What are the causes of this situation?	
Why is there a performance gap? How can it be?	
Is the gap caused by knowledge, skills, or attitude shortfalls?	

Step 4. Consider potential solutions

Question to Consider	Your answer
What do people have to do to reach our goal?	
What stops employees from doing this one thing?	
Is it knowledge and skills discrepancy that causes the situation? Or is it the workplace environment and poor motivation that hinders performance?	
Do employees need to be shown how to perform tasks/ deliver services more effectively?	
Can employees find it helpful to practice in simulated experiences	

You can dig into the details with the interview questions below. We have made them into convenient spreadsheets that you can take to your interview session with stakeholders and employees.

I. INTERVIEW WITH STAKEHOLDERS WORKSHEET

Interviewee: _____ / _____
(Name) (Position)

Date: _____

1 What problem are you going to address with the new employee training program? Why do you think the training is necessary?

2 How is this problem being addressed now?

3 How are employees performing? What results are being achieved?

4 What should be happening (as opposed to the current performance)? What are the goals?

5 What prevents the goals from being achieved:

a. Is the gap between the current and the desired performance caused by knowledge, skills, or attitude shortfalls?

b. How much of the gap is caused by the environment, a process, or a technical factor?

6 What is the target audience for the training? How many people are there? What is their age, location, job position, level of education, and preferred style of learning?

7 Have they received any training in the past?
(What kind? What was the result?)

8 Have you considered anything other than training solutions to address the problem?

II. INTERVIEW WITH EMPLOYEES WORKSHEET

Interviewee: _____ / _____
(Name) (Position)

Date: _____

1 What are the main knowledge and skills required for your job?

2 What is the most challenging part of your job?

3 Can you list any factors that you feel are preventing you from reaching the maximum results in your job?

4 What would help you to perform your job successfully?

5 Do you think that training could help you to be more efficient at your job? If so, what kind?

6 Have you received any training in the past? If so:

- a. What kind? (List any courses and workshops you attended while working for the company.)
- b. Did any of the training help with your job results? How?

III. GAP ANALYSIS TEMPLATE

Focus Area	Write down the targeted areas such as customer service, onboarding, etc.
Current State	Write down the current performance indicators.
Desired State	Write down the desired performance indicators.

Identified Gap	Write down the difference between the current and desired performance level.
Effect of the Gap	Write down how the existing gap affects business.

IV. NEED ASSESSMENT CHECKLIST

- You've conducted an initial interview with the client.
- You've analyzed the present situation at the company.
- You've got credible information about the current performance of the employees.
- You've explored the gap between the present situation and the desired outcome.
- You've established clear and measurable goals.
- You've found the root cause of the existing performance gap.
- You've made sure that all parties involved agree about the cause.
- You've analyzed all the plausible alternative ways to reach the same goal.

USEFUL RESOURCES TO HELP YOU ELEVATE EMPLOYEE TRAINING

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