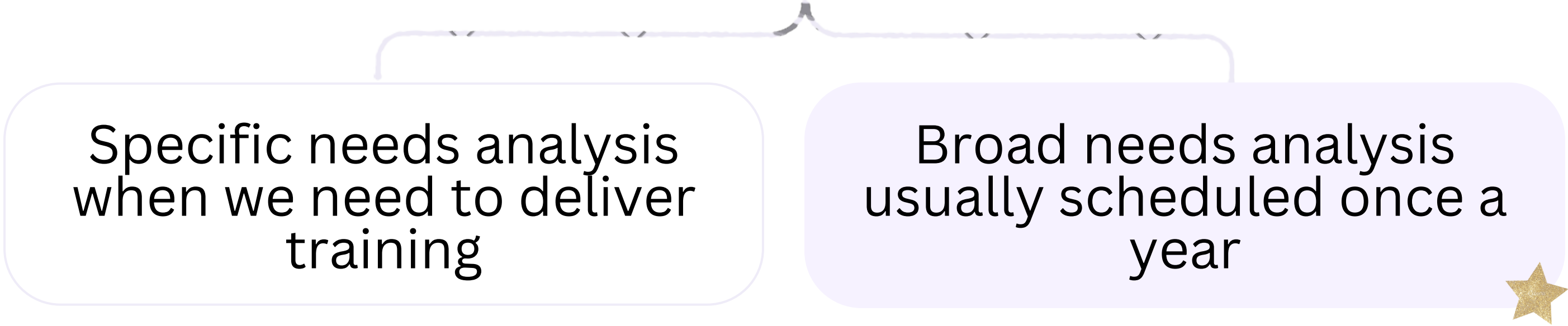


Needs Analysis is broken. Let's fix it together 🙌

with Lavinia Mehedintu



Two types of needs analysis



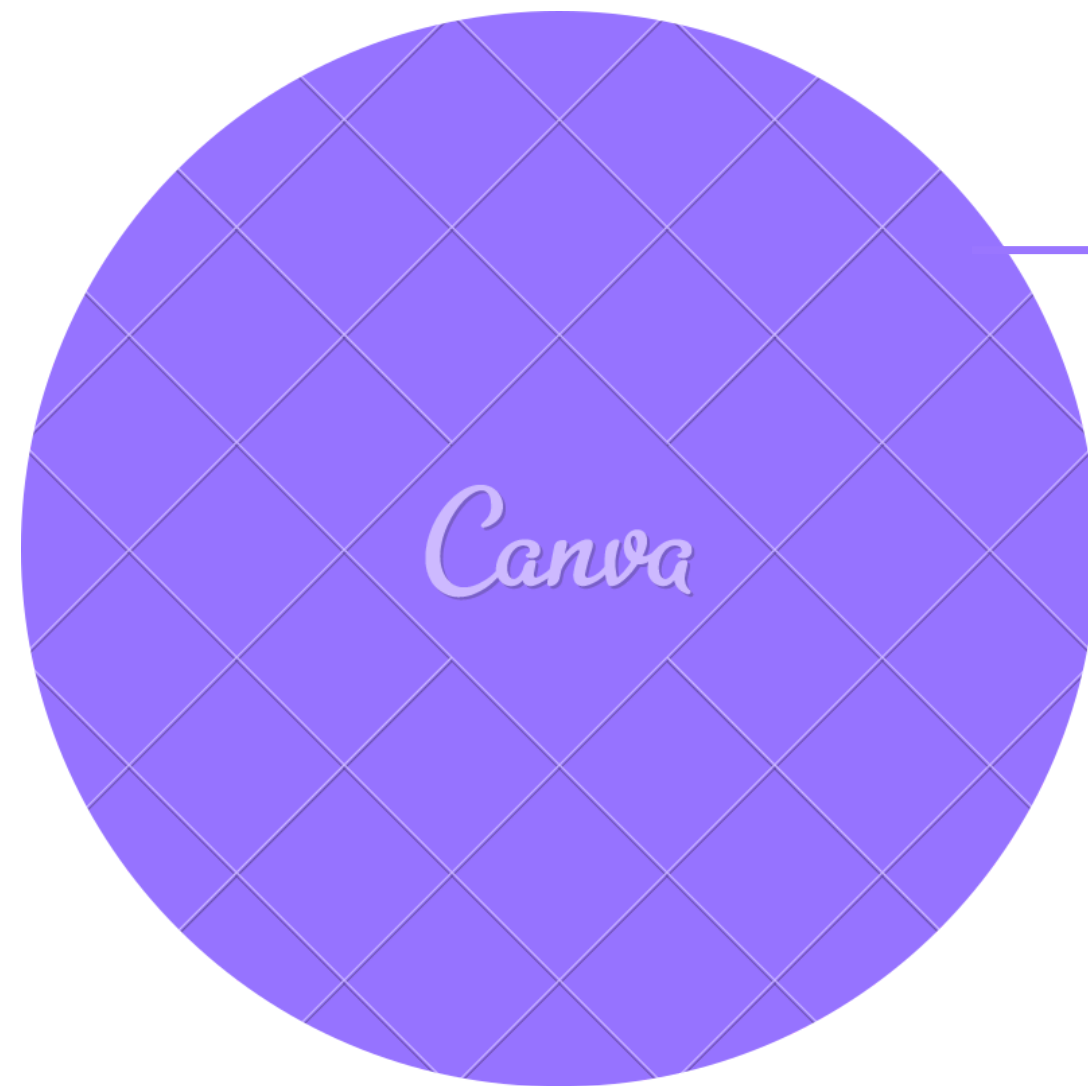
```
graph TD; A[Two types of needs analysis] --- B[Specific needs analysis when we need to deliver training]; A --- C[Broad needs analysis usually scheduled once a year];
```

Specific needs analysis
when we need to deliver
training

Broad needs analysis
usually scheduled once a
year

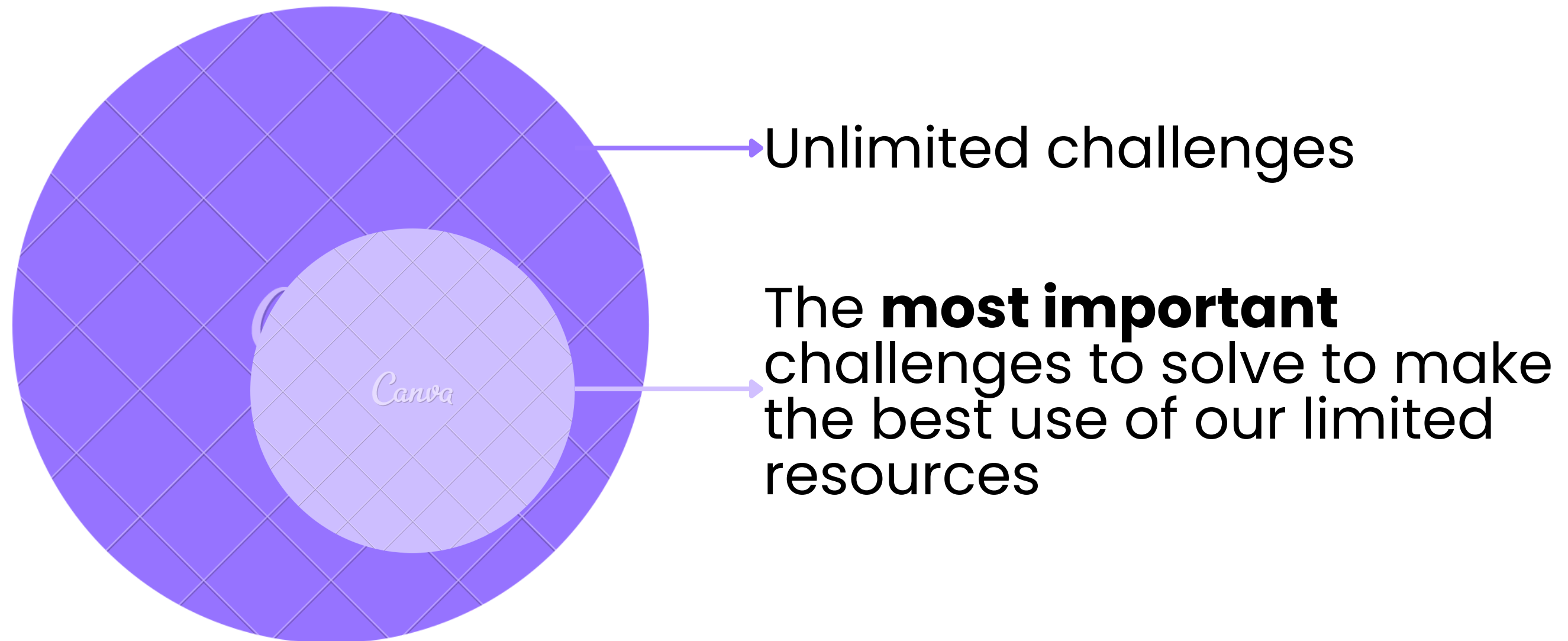


Why do we run needs analysis?



→ Unlimited challenges

Why do we run needs analysis?



The purpose of any
needs analysis
process is to help us
prioritize the most
important
**challenges to be
solved.**

the reality
↙
The purpose of any
needs analysis
process is to get **a
list of trainings** we
should run next
year.

Why is the needs analysis process broken?

1

We're calling it ~~training~~ needs analysis

2

We're calling it ~~learning~~ needs analysis

3

We underutilize available data sources

4

We go from needs analysis → budgeting

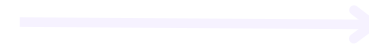
5

The output of needs analysis is a list of trainings

6

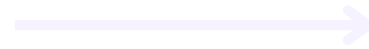
We don't ask for feedback

We're calling it
~~training~~ needs
analysis

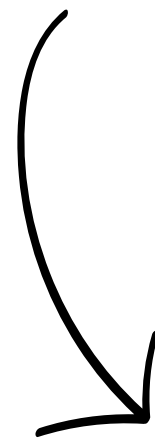


Assumption #1 –
training is the only solution
we have available in L&D

We're calling it
~~training or learning~~
needs analysis



Assumption #2 –
the issue is a behavior or
skill gap



*we end up creating training
nobody wants or needs*

*If I had asked people what
they wanted, they would have
said faster horses.*

Henry Ford



Needs analysis as a training identification process

The purpose of the process is to understand what trainings they want us to organize

Needs analysis as a problem solving process



The purpose of the process is to understand which are their biggest challenges

Principle 1



Needs analysis as a problem solving process

Asking better questions – “The Mom Test”

PASSES THE “MOM TEST”

questions even your
mom won't lie to you
about

Yup, she's likely going to
lie when you ask “Mom,
would you attend this
training?”

THEIR LIFE / PROBLEMS

not ideas / solutions
but day-to-day
inefficiencies

Get them to walk you
through their daily life
and pinpoint
inefficiencies or
challenges

THE PAST

not hypothesis/ the
future

Problems they have
actually encountered

SPECIFIC DETAILS

not generics/ vague
information

No one was ever able to
improve on vague
feedback

Manager Interview Cheat Sheet

Manager: _____

Pre-Interview Preparation

Are there known challenges or successes within the team that should be explored?
What data do I want to discuss with them (eg. look for low/ high engagement in previous learning programs, exit data, engagement scores)?
How has the composition of this team changes over the past couple of months?

Hint: Take 10 minutes before the interview to list as many details as possible about past knowledge and interactions with this manager. Chances are you will earn their trust once they see you came prepared and get them to open up easier.

1

Historical Background

What was your focus in the past couple of months?
What are the biggest challenges you and your team faced?
Are these challenges still on the horizon? If so, how severe are they?
What successes or improvements have you observed?
What L&D programs have the manager and their team participated in recently?
How effective were these programs in addressing the team's needs?
How does the manager perceive the relevance and quality of past L&D efforts?

2

Future: Priorities

What key projects or objectives do you have on the horizon for your team?
What will be critical for the team's success in the upcoming period?
What are the biggest challenges you foresee?
Can you describe why these are the most important challenges and who needs to address them?

3

Future: General Challenges

What other challenges are you experiencing?
Why do you think this is happening?
How severe is this problem?
How much is this costing you?
How does this problem ultimately affect you, your team, the organization, our clients?
What are you currently doing to address this problem?
When would you need to fix this problem?
How urgent do you feel this is?

4

Other Observations

Have we discussed everything that's important for you?
What else should I know?
Is there anything from our discussion you would want to revisit?

6

Future: Requests

Can you explain why you think this would be a potential solution for your challenges?
What would happen if we wouldn't deliver?
What support would we get from you in delivering this?

Hint: It might be impossible for you to escape the manager's urge to share a list of trainings with you. Politely tell them that before you can consider any of those solutions you need to better understand the context of the problem they are trying to solve. Ask "why" as many times as you need to uncover the root cause.

5

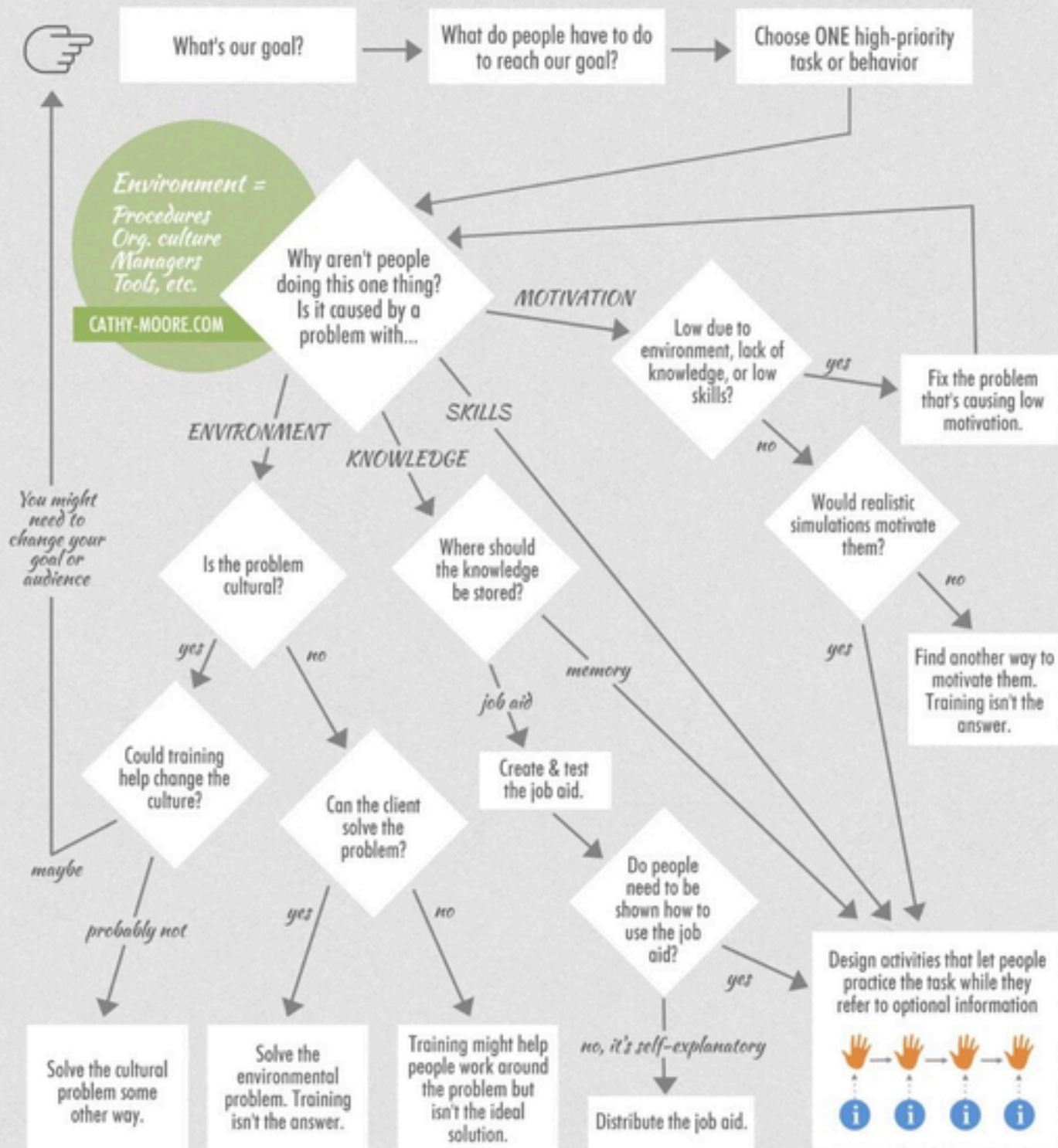
Hint: Spend 5 minutes after finishing the interview reviewing the information. Ideally, share this canvas as a follow-up with the manager and ask if there's anything they would add.



Download Cheat Sheet

WILL TRAINING HELP?

What's causing our problem,
and how can we solve it?



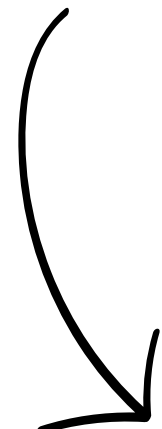
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Download Cathy Moore's Framework

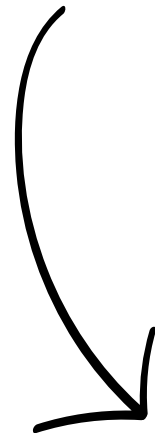


How many of you talk
to people managers
during needs
analysis?



hand up!

How many of you think
what your people
managers tell you is
100% accurate?



keep your hand up!

Needs analysis as a training identification process

The purpose of the process is to understand what trainings they want us to organize

People managers as single source of truth

Needs analysis as a problem solving process

The purpose of the process is to understand which are their biggest challenges



Diverse data sources to confirm or invalidate assumptions

Principle II



**More data sources lead
to better accuracy**

**Performance Management System**

Identifies skill gaps and performance trends that can shape future programs.

**Exit Surveys & Interviews**

Provides insights into potential organizational improvements and needs not met.

**Pulse Surveys**

Offers real-time feedback on immediate needs and the effectiveness of ongoing L&D initiatives.

**Previous L&D Requests**

Reflect direct employee input on challenges and desired areas of growth.

**L&D Team Knowledge**

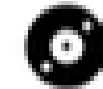
Leverages the L&D team's collective experience and understanding of what works to refine and target future initiatives effectively.

**360 Feedback Results**

Offers a well-rounded view of employee competencies and development areas from multiple perspectives.

**Onboarding Survey Results**

Highlights the effectiveness and gaps in current onboarding processes, indicating areas for improvement.

**Learning & Development Records**

Shows trends in employee learning preferences, previous feedback, and the impact of programs on performance.

**Individual Development Plans**

Signal employee needs directly tied to their career development aspirations.

**Interviews with People Partners**

Provides qualitative insights into department-specific challenges and needs that can inform the customization of L&D programs.

**Engagement Survey Results**

Reveals the relationship between employee engagement levels and potential areas for learning interventions.

**Churn/ Turnover Data**

Signals the need for retention strategies possibly tied to career development opportunities.

**Succession Planning Data**

Indicates future competencies required for leadership development and strategic roles.

**Workforce Planning Data**

Assesses the long-term skills needed to meet strategic business goals, shaping future L&D objectives.

**All Hands Records**

Capture company-wide announcements and initiatives that can pinpoint shifts in strategic focus requiring new programs.

**Individual Contributors' Input**

Gain ground-level insights into the daily challenges and skills gaps directly from those performing the core work.

**C-Level Input**

Understand the broader business vision and priorities to tailor L&D initiatives that support top-level strategy.

**Industry Insights**

Keep L&D strategies relevant and forward-thinking by incorporating current industry trends and future skill requirements.

**Sales Performance Data**

Correlate sales metrics with learning initiatives to focus on developing skills that directly impact sales effectiveness and revenue generation.

**Strategic Planning Documents**

Identify long-term company objectives to align learning and development goals with the organization's strategic direction.

**People Managers' Input**

Obtain detailed knowledge of team dynamics and specific departmental needs from those who manage teams.

**Operational Dashboards**

Assess real-time data on operational performance to quickly identify areas where learning can improve efficiency and effectiveness.

**Customer Satisfaction Scores**

Use customer feedback to highlight specific areas where employee-customer interactions can be enhanced through targeted programs.

stage 1

do we have access
to this data source?

stage 2

do we trust this
data source?

stage 3

will we use this
data source?



Needs analysis as a training identification process

The purpose of the process is to understand what trainings they want us to organize

People managers as single source of truth

We have the list of trainings they want, we decide which ones to budget

Needs analysis as a problem solving process

The purpose of the process is to understand which are their biggest challenges

Diverse data sources to confirm or invalidate assumptions



We understood their challenges, so we come up with potential solutions

Principle III



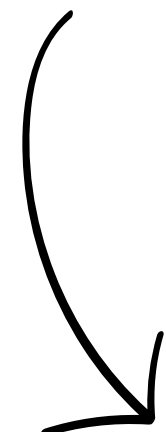
**After needs analysis we
take a break to
brainstorm all potential
solutions**

*For every complex problem,
there's a solution that is
simple, neat, and **wrong**.*

H.L. Mencken



What potential
solutions could we
propose?



training & e-learning is not allowed!

What solutions can we suggest?

What are the implications for our L&D team?

What solutions will we need to test?

What budget should we allocate?

What other resources do we need?

How will we know our solutions are impactful?

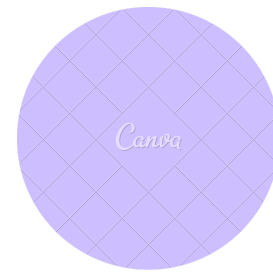
What are the implications for other teams?

What solutions can other teams test to help solve this challenge?

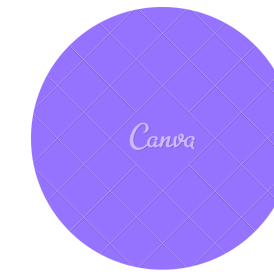
Who should we reach out to and for what?

How can we explain our challenge in a way that gets them on board?

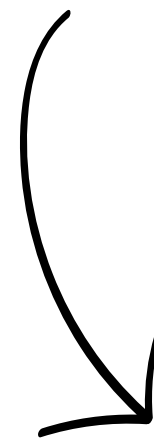




Needs Analysis



Budgeting



Assumption: all solutions require a budget

Needs analysis as a training identification process

The purpose of the process is to understand what trainings they want us to organize

People managers as single source of truth

We have the list of trainings they want, we decide which ones to budget

We deliver the trainings whenever they're budgeted

Needs analysis as a problem solving process

The purpose of the process is to understand which are their biggest challenges

Diverse data sources to confirm or invalidate assumptions

We understood their challenges, so we come up with potential solutions



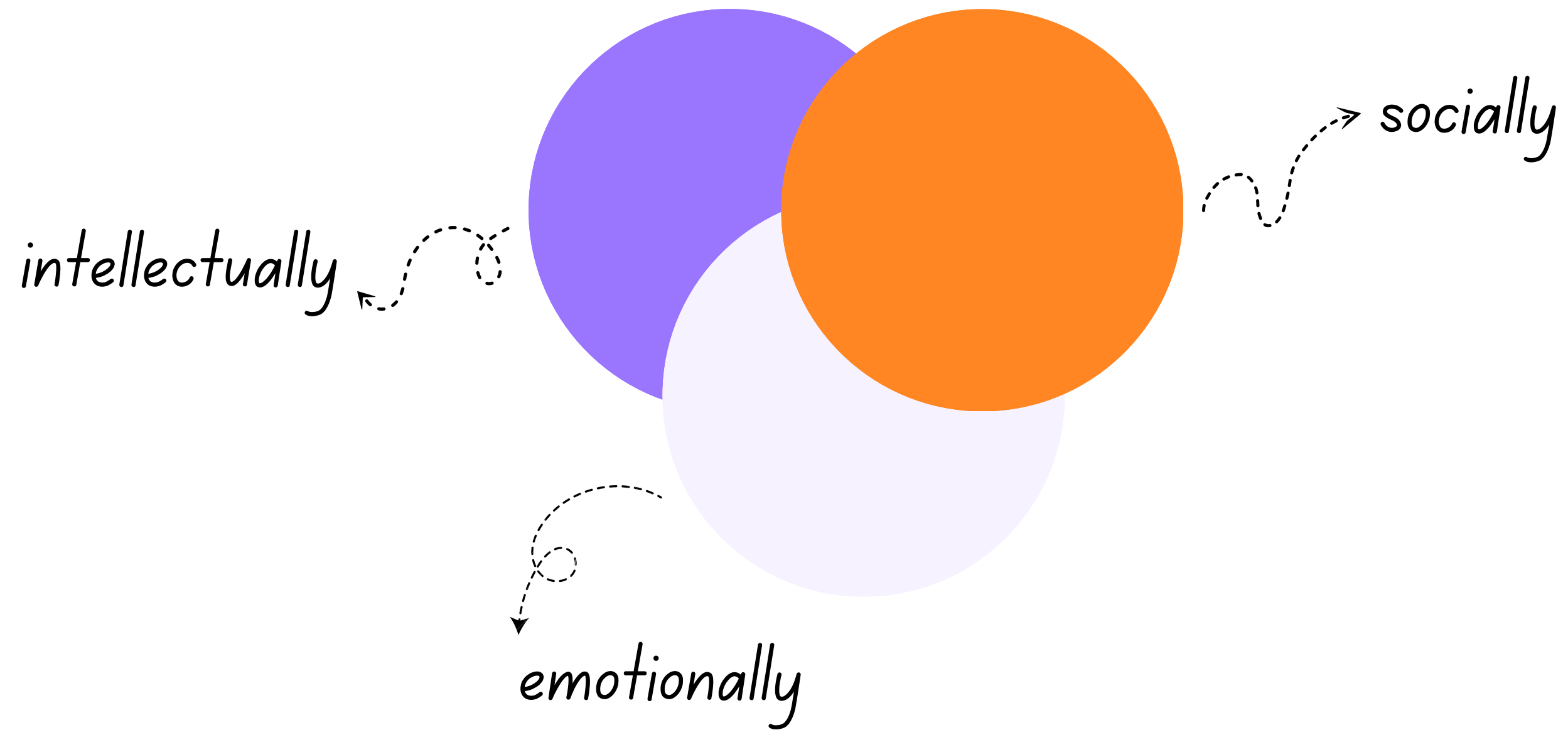
We put together solutions in a strategy & ask for feedback before implementation

Principle IV

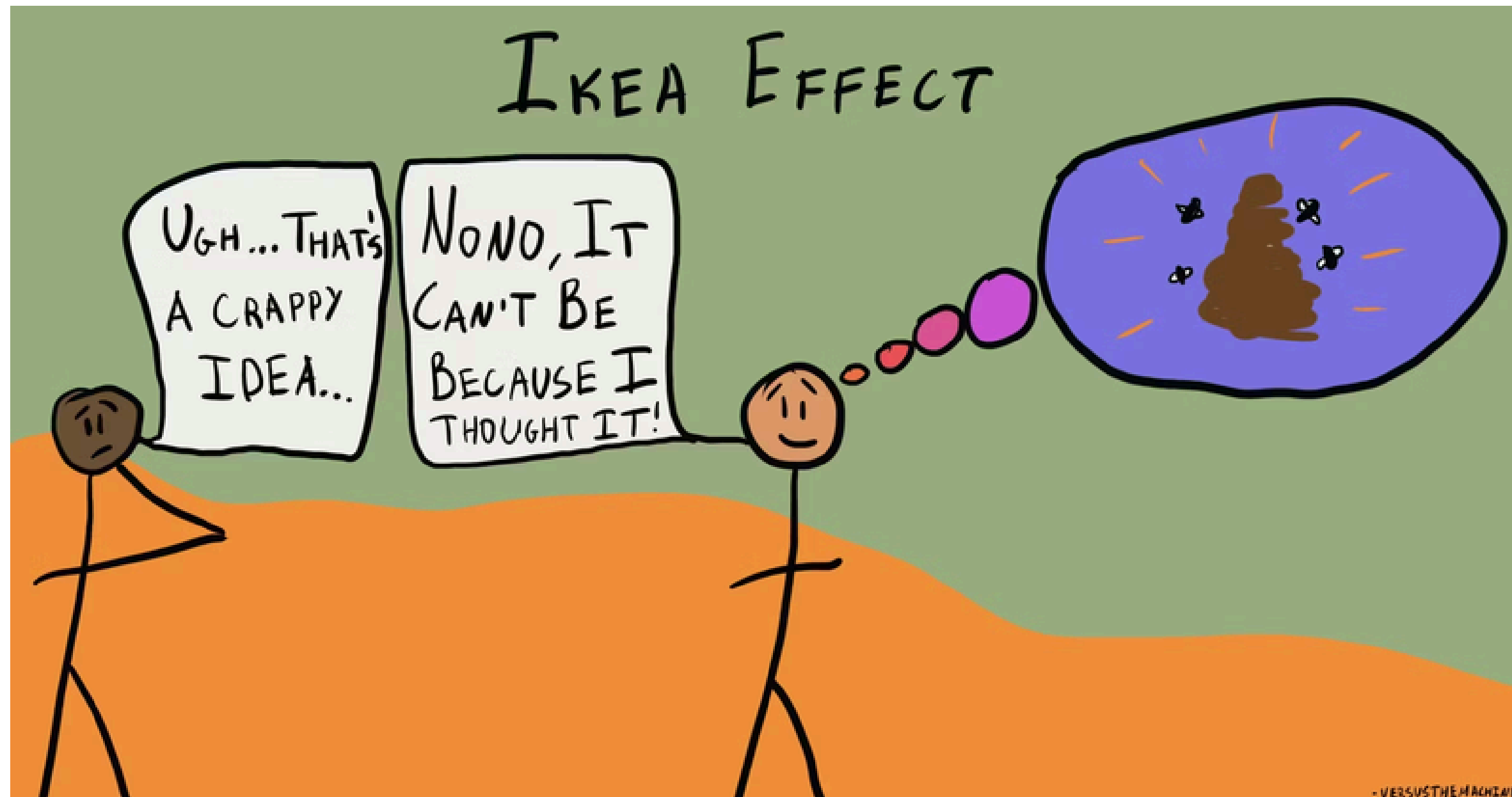


**Asking for feedback &
co-creating early on
leads to better
outcomes**

Co-creating learning experiences with learners helps us meet them where they are in a very holistic way.



Co-creating learning experiences with learners leads to better engagement & support from them.



Adopt iteratively



Principles for strategic needs analysis

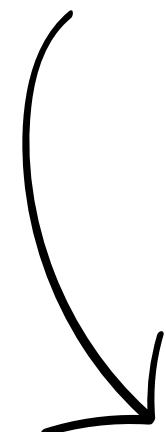
Needs analysis as a
problem solving
process

More **data**
sources lead to
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After needs analysis
we take a break to
brainstorm all
potential **solutions**

Asking for **feedback &**
co-creating early on
leads to better
outcomes

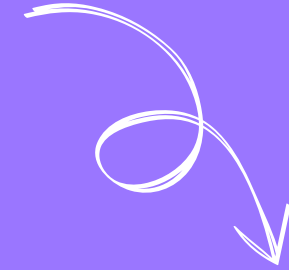
What are you taking
away today?



let's chat for 5 min!

We've been chasing the "seat at the table" for years. Getting it will require more than obtaining and running lists of trainings. It will require strategic, systeming, and critical thinking.

Explore additional resources



October, 24th | Belgium

Needs Analysis is broken. Let's fix it together



*Delivered by
Lavinia Mehedintu*

[Review presentation →](#)

