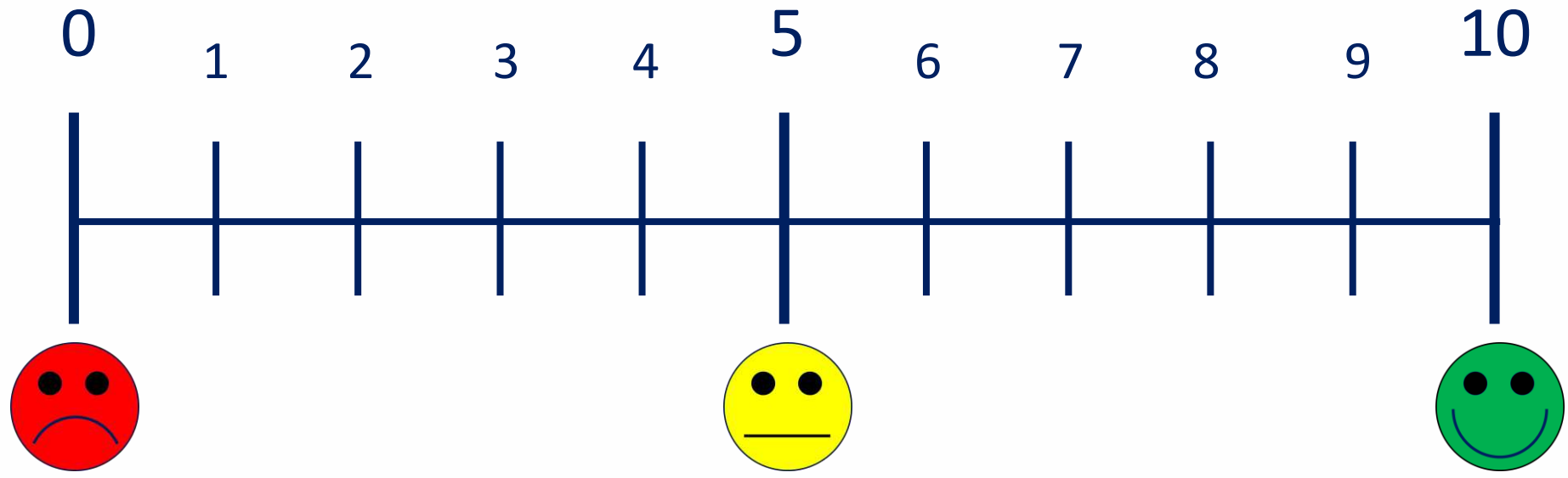# Analysing Needs

Ben Dobbs

SUDS – Subjective Units of Distress Scale

How are you, today?

Your Personal Shield

Something you accomplished
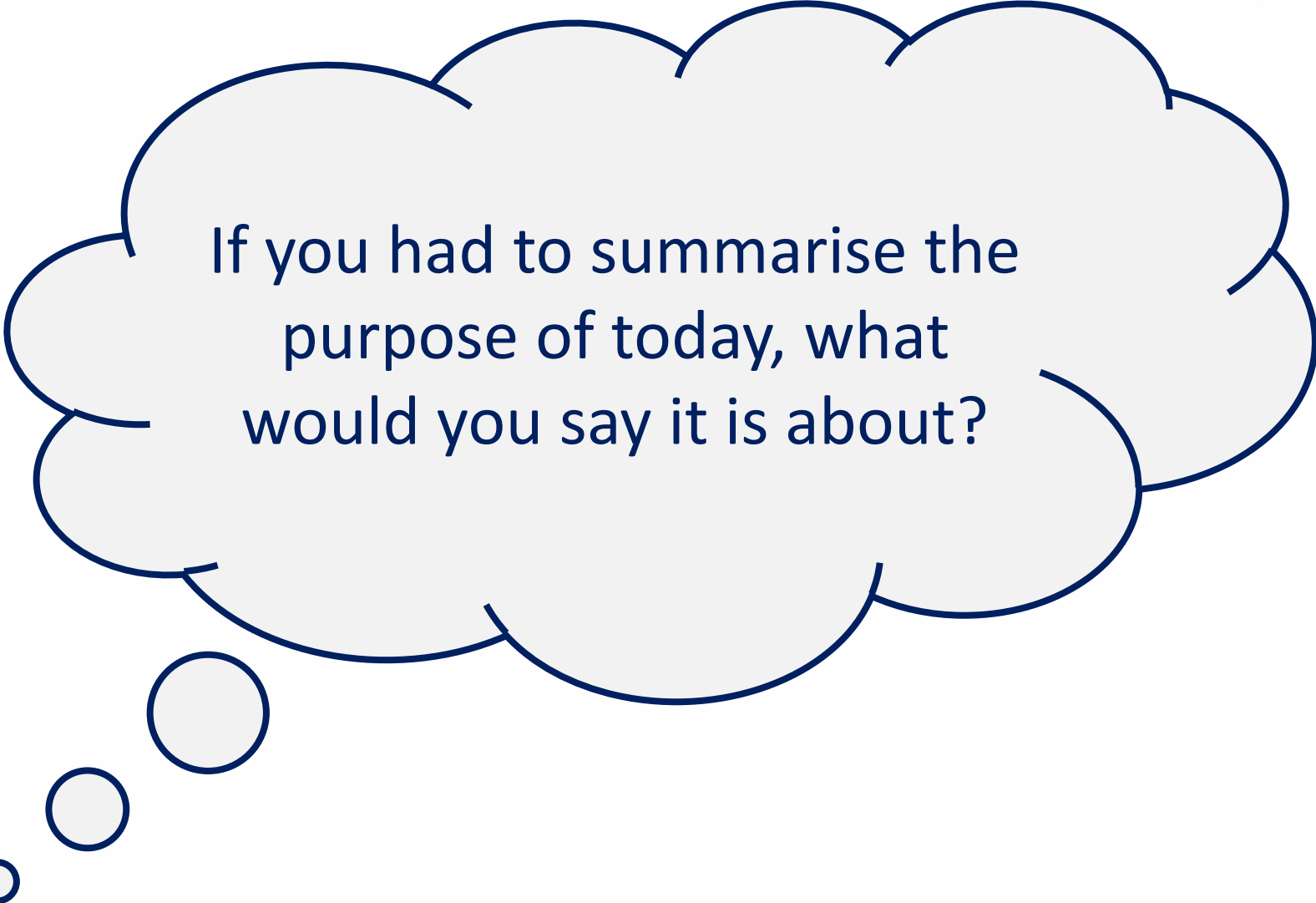
Dream

Your free time

Something surprising, shocking, interesting or strange

Home

Work

Motto
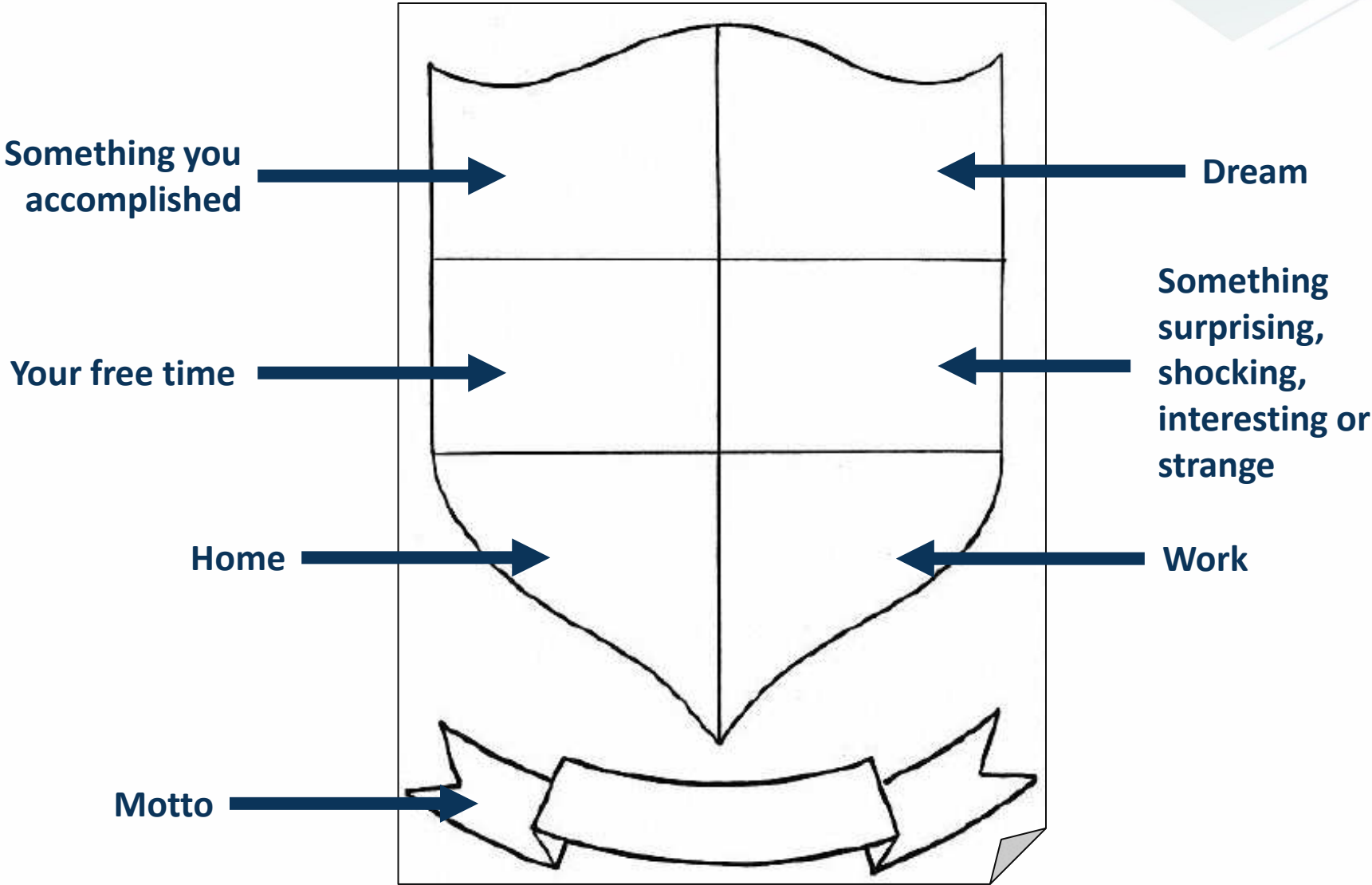
Today's Structure

Today's Programme

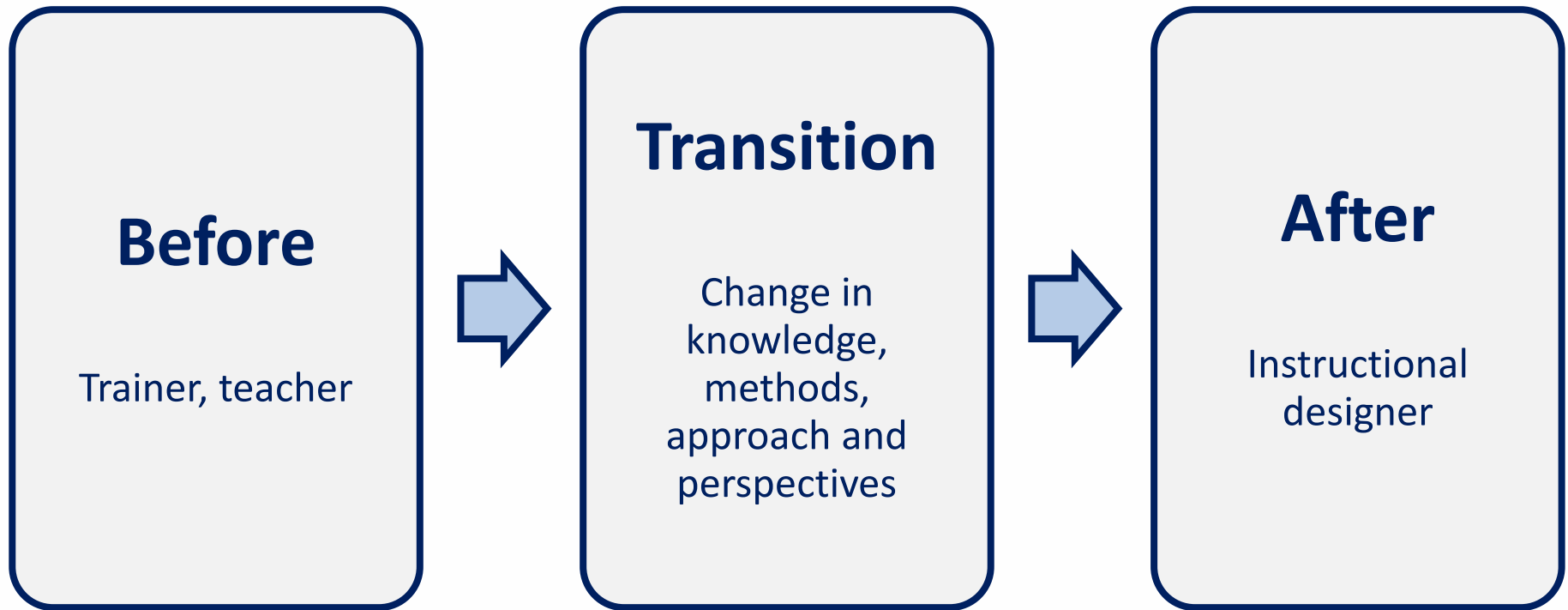| Speaker	Topic	Themes
Ben Dobbs	Analysing needs	• Needs analysis • KPI Usage
John Hughes	Toward a course outline	• Goals, aims and objectives • Relating course outlines
Rachel Appleby	Considerations when writing materials	• Technical skills of writing • Authentic material

Today's Purpose

Purpose

If you had to summarise the purpose of today, what would you say it is about?

Transition

Today is about change and an important transition:

Before	**Transition**	**After**
Trainer, teacher	Change in knowledge, methods, approach and perspectives	Instructional designer

Instructional Design

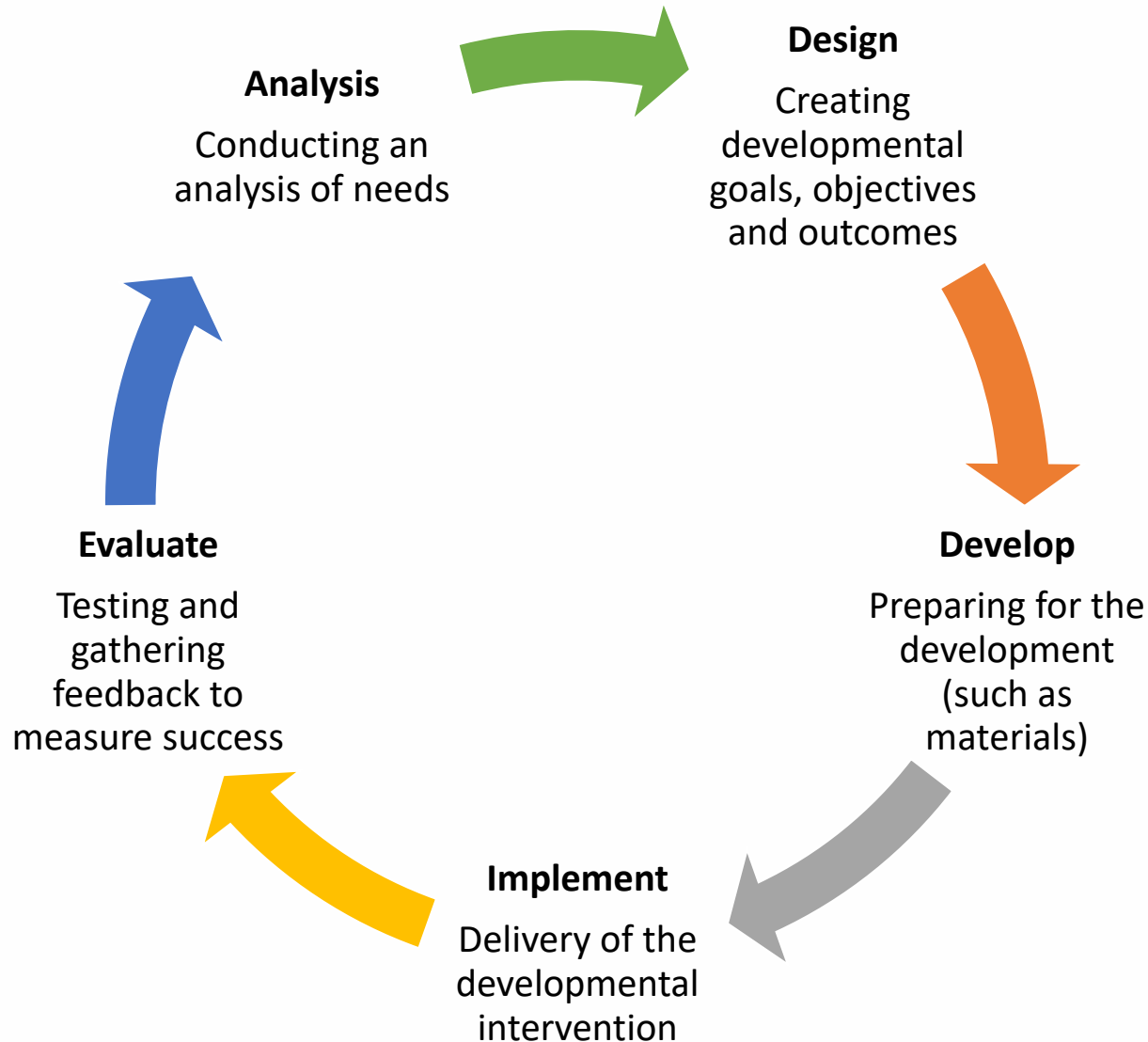# "Training" Versus "Instructional Design"

Training:
- Concerned with what goes on in the training room
- Can involve bespoke or prescribed materials
- Does not necessarily involve formalised analysis of needs
- Goals, objectives, outcomes can be set by other stakeholders (such as HR, T&D and so on)
- Does not necessarily involve formalised evaluation of outcomes
- Can just be a matter of attendance
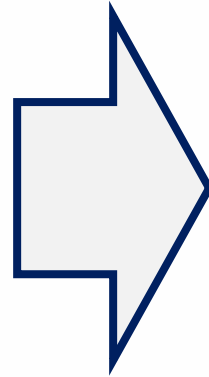
Instructional Design:
- A systematic and structured approach to development
- Focuses on what happens before, during and after training
- Concerned with analysis of needs and responding to needs
- Not only focused on completion
- Goals, outcomes and objectives set in response to needs
- Involves greater levels of bespoke material design
- Evaluates and assesses impact in various ways
- Links to key models

The ADDIE Model of Instructional Design

Analysis
Conducting an analysis of needs

Design
Creating developmental goals, objectives and outcomes

Develop
Preparing for the development (such as materials)

Implement
Delivery of the developmental intervention

Evaluate
Testing and gathering feedback to measure success

Needs Analysis

Needs Analysis

What is "needs analysis"?

Needs Analysis

Needs analysis:
- **May be a single event prior to a course**
- **May be a process conducted on an ongoing basis**
- **Must be acted upon / is not just an academic exercise or for its own sake**
- **Can take various forms**
- **May involve research**
- **May involve testing**
- **May involve profiling**
- **Should inform course design**
- **Links to evaluation**
- **Has no paradigm**
- **Should differentiate needs and wants**
- **Should, ideally, be conducted by the course designer**
- **May be carried out by a third party**

Needs Analysis Methods

How can developmental needs be analysed?

Needs Analysis Methods

There is no single perfect method or standard for analysing needs.

Methods of conducting needs analysis include:

- **Form / questionnaire completion**
- **A face-to-face or phone interview**
- **A examination or placement test**
- **The results of observation or feedback**
- **A profiling tool (such as a psychometric test or questionnaire)**
- **An assessed task or simulation**
- **General decisions based on strategy (needs of all rather than one)**
- **A personal analytical tool (SWOT or SWMS) by the participant or their manager**
- **A review of KPIs or results**
- **Asking what development people want or need**
- **360-degree feedback**
- **Strategic decisions based on organisational need or direction**
- **Allocation of points by a participant to key subject areas**

Designing a Needs Analysis Questionnaire

Designing a Needs Analysis Questionnaire and Considering Question Types

You need to consider what personal details the questionnaire should gather. These may include:

- **Name**

- **role**

- **Age**

- **Nationality**

- **Any special educational needs**

Question types on a questionnaire include:

- **Dichotomous** ("Yes" or "No")

- **Multiple choice** (A, B, C or D)

- **Likert scale** ("1 strongly disagree" to "5 strongly agree")

- **Semantic differential** ("1 low importance" to "7 high importance")

- **Paired comparison** ("What is more important to you: fluency or accuracy?")

- **Forced rank order** ("Put these in order from 1 least important to 5 most important")

- **Open questions** ("What ...?" and so on; any answer, long or short, is possible)

- **Comments box** (A space for "any other comments")

KPI Basics

KPIs Defined

"KPI" stands for **(1)** "Key Performance Indicator ....". We may also call KPIs
(2) "...........metrics..........................." or **(3)** "................measures........................". Use of the word "key"
suggests **(4)** ....importance.......................... compared to a wider group of potential measures.

KPIs help managers understand how well **(5)** ....individuals..........................,
(6) ....teams................. and the **(7)** ....organisation................... overall are performing in
relation to their **(8)** ....goals.................. and **(9)** ....objectives.................. as well as what
progress is being made towards an overall **(10)** ....strategy....................... A KPI is different to a
(11) ....target................... which is a number to aim for or exceed rather than something we
measure.

A KPI provides the most important **(12)** ....measurement.................. of performance. This information
enables organisations or their **(13)** ....stakeholders................ to understand if something is on track
or not. KPIs are reported, recorded and tracked using a **(14)** ....dashboard......................

KPIs inform **(15)** ....decision making................ and allow us to identify how things are progressing. They
can also identify other issues such as **(16)** ....training needs.............. or
(17) ....quality issues.................. These may also show up issues such as an impending
(18) ....crisis.................... when a change in KPIs acts as a warning of what is to come.

KPIs reduce the **(19)** ....complex................ nature of organisational performance to a small
number of indicators to make it more **(20)** ....understandable.............. for us.

KPIs – Input, Process, Output

Key performance indicators monitor performance. They come in three main types:

Input KPIs: measure assets, resources used and purchases made to achieve results.

Process KPIs: measure the efficiency or productivity of a business process.

Output KPIs: measure the financial and non-financial results of business activities.

Input KPIs	Process KPIs	Output KPIs
- Funding - Spending - Raw materials - Quality of raw materials - Number of staff	- Production time - Days to deliver - Number of days to reply - Number of personnel trained - Days taken to fill vacancies - Number of defects - Number of accidents	- Sales revenue - Items produced - Gross and net profits - Number of new customers - Increase in staff - Return on investment (ROI) - Customer satisfaction (CSAT)

Lagging and Leading KPIs

In terms of time and effect, we have two types of KPIs:

Types of Indicator	Meaning	Examples
Lagging indicators	Report what has happened in the past	• Revenue (reporting what has happened; does not indicate the future) • Percentage of trains arriving late or on time (reporting what has happened as part of a report) • Individuals recruited (reports how many)
Leading indicators	Report what has happened that will / could have an effect in the future	• Customer satisfaction (suggestive of future business and brand loyalty) • Defaults on loan repayments (suggestive of negative changes in the economy) • Employee satisfaction (suggestive of future staff turnover)

Note: some KPIs can be both!

KPIs and Needs Analysis

How can KPIs help us analyse developmental needs?

KPIs and Needs Analysis

KPIs link to needs analysis in various ways:

(1) They show where training on an individual and departmental level is needed such as when customer complaints increase, training in customer service may be needed.

(2) They show the impact of training / return on investment on a before and after basis such as revenue before and after sales training.

(3) They link training to strategy by looking at the overall goal and vision, and ensuring training plays a part in reaching the overall desired outcome.

(4) They identify what type of training is needed on a proactive basis by considering what departments and staff are expected to achieve.

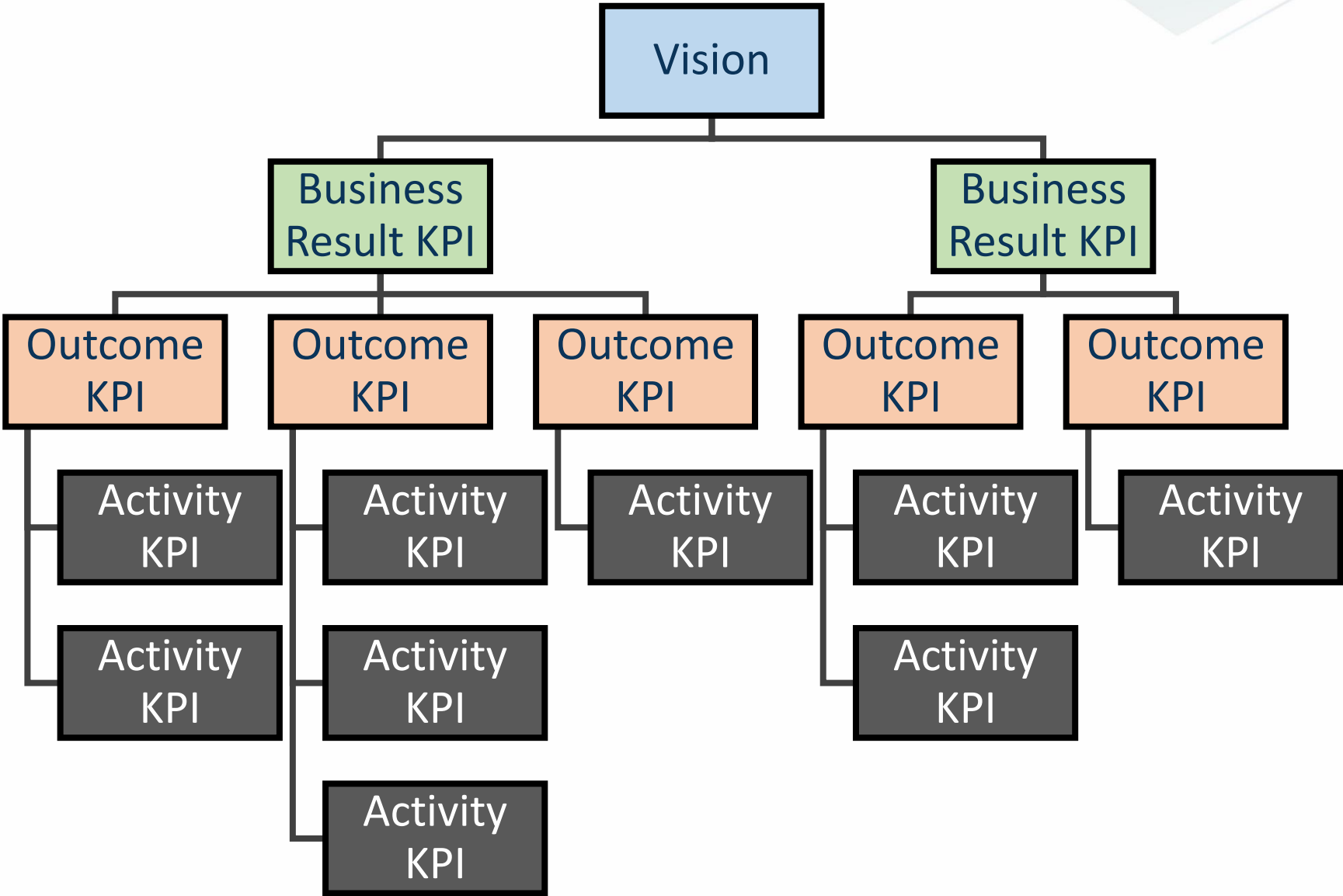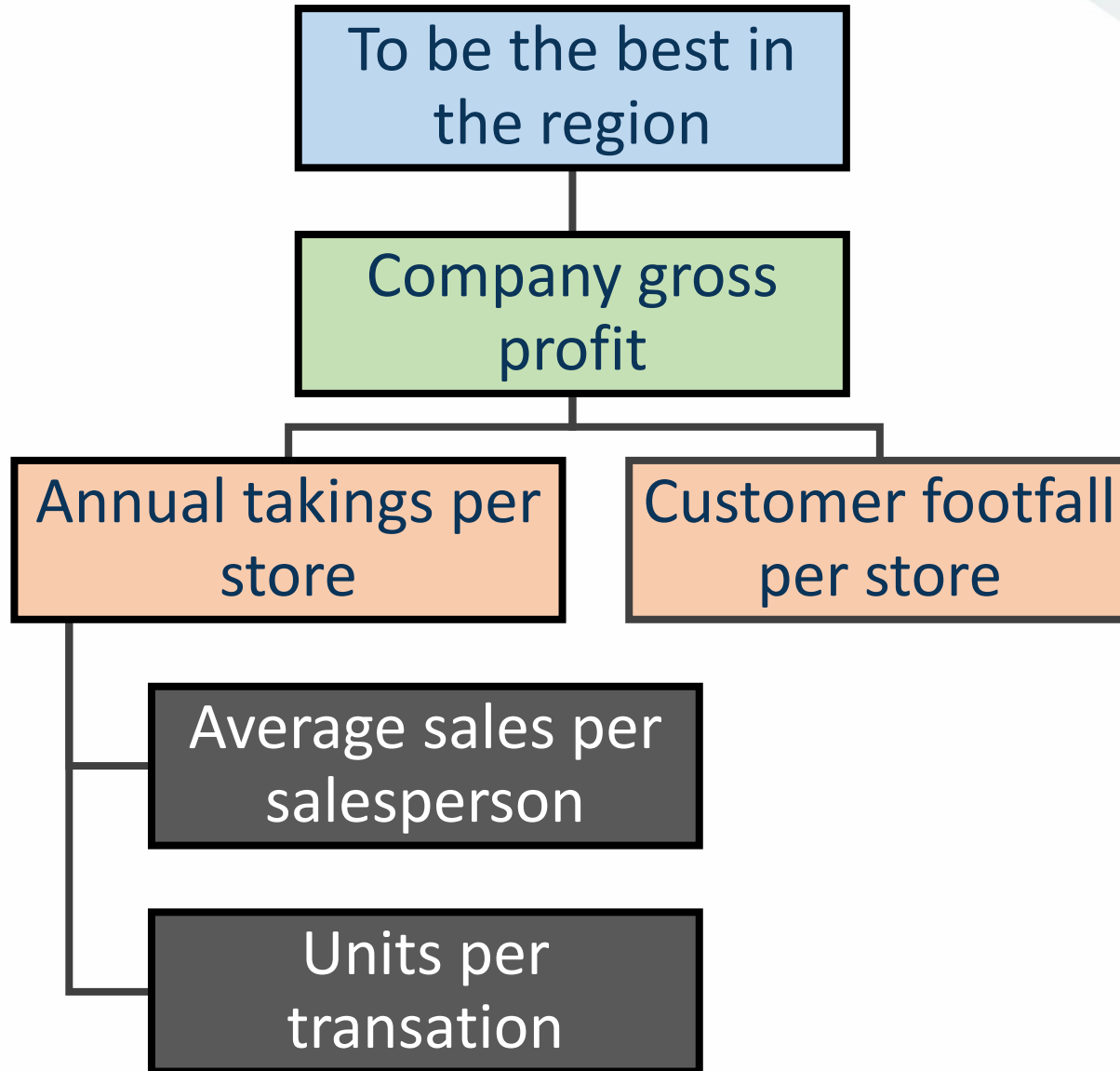**(5)** Training impacts upon KPIs such as employee turnover.

KPI Trees

Horizontal KPI Trees for Setting KPIs
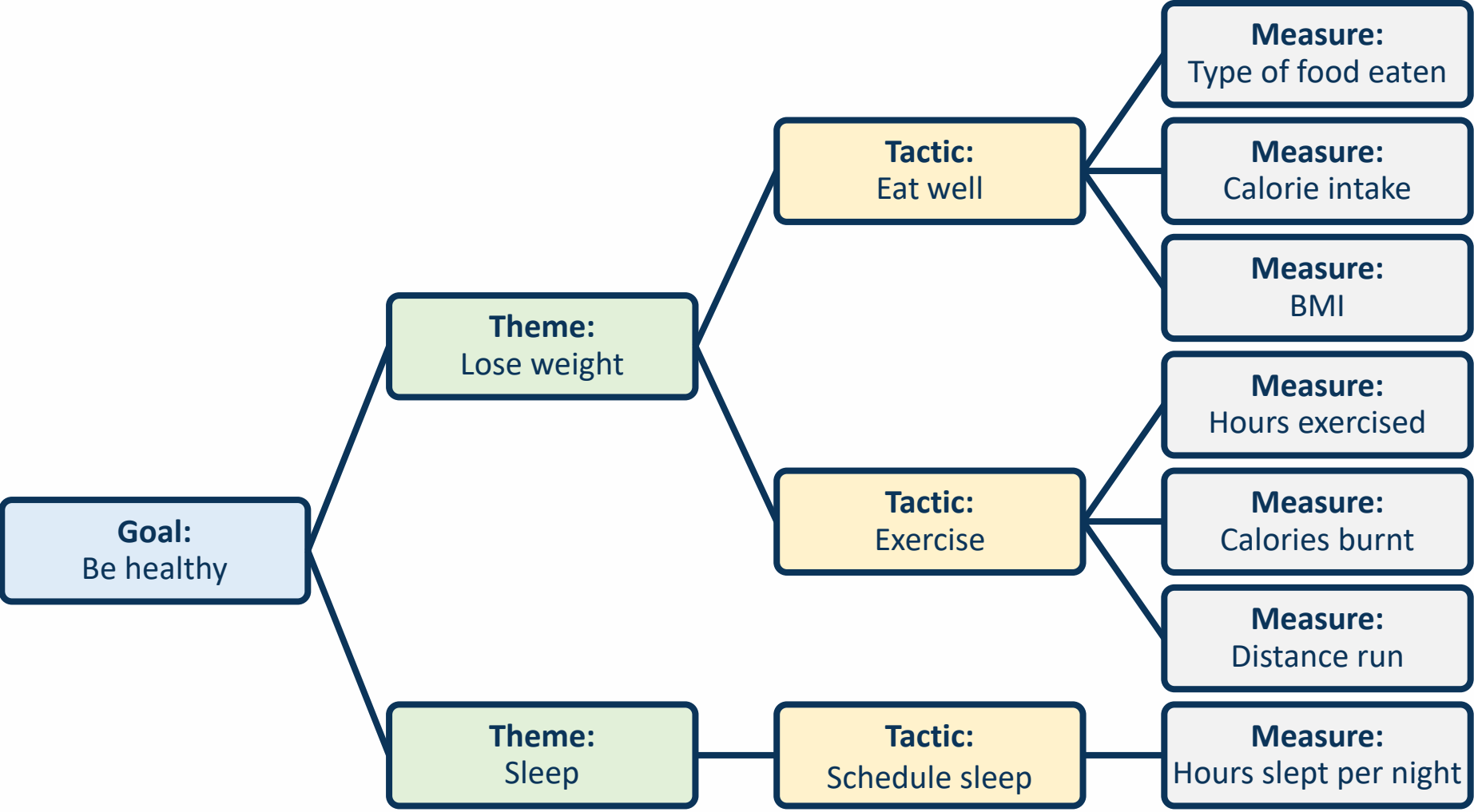
Vertical KPI Trees for Organisational Levels

KPI Trees and Organisational Levels

Reading

Recommended Reading

Marr, Bernard (2012) *Key Performance Indicators: The 75 Measures Every Manager Needs to Know*. Harlow: Pearson.

Molenda, Michael (2003) "In Search of the Elusive ADDIE Model" in *Performance Improvement*, 42 (5), pp. 34–36.

Skills Converged (2016) *Train the Trainer: The Art of Training Delivery* 2nd Ed. London: Skills Converged.

Smith, Bernie (2013) *KPI Checklists*. Sheffield: Metric Press.
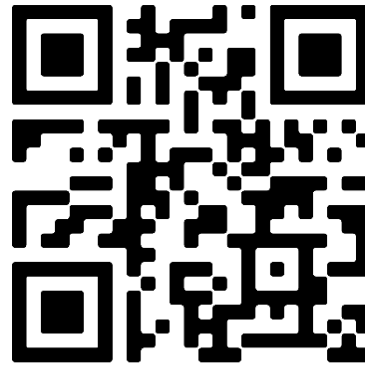
Contact

Ben's Contact Details

Ben Dobbs

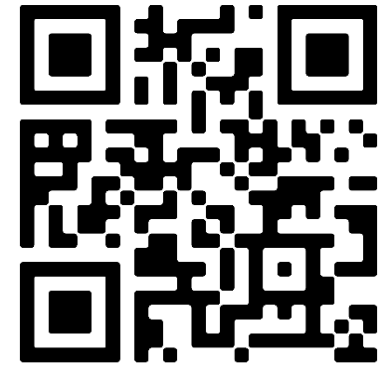ben@distance-cert.com

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Distance Cert IBET

Distance Cert EXEC