

TRAINING NEEDS ANALYSIS



WHAT IS A NEEDS ANALYSIS?

It is a systematic means of determining what training programs are needed. Specifically, when you conduct a needs analysis, you –

- Gather facts about training needs
- Analyze those facts
- Recommend a training program

Identify real needs

A cursory analysis of the situation may result in selecting the wrong subject for training, thus wasting time and money. A careful analysis identifies real training needs and results in a training program that will make an important contribution to productivity and profit.

EXAMPLE

Several staff members tell the training manager that the sales representatives need training in “making a presentation.” The training manager conducts a needs analysis and determines that the real need is for training in “probing and listening” so that the representatives can more accurately focus on the doctor’s specific requirements. The training manager’s program will, therefore, be on target.

Gather detailed information

Even if a vague statement of a training need is reasonable, it does not provide enough detailed guidance for the training manager. The needs analysis must also provide specific and accurate information on the scope of the program – outlines, visual aids, schedules, and so on.

EXAMPLE

A regional sales manager tells the training department that the district managers need training in “field coaching.” The training department conducts a needs analysis and determines that the need could be met by a one-day training program covering allocation of time among the sales representatives, analysis of sales calls, critique techniques, and follow-up.

Four-step procedure

A needs analysis consists of four steps:

1. Focusing the subject of the analysis
2. Planning the fact gathering
3. Gathering the facts
4. Preparing a report

A needs analysis is the training department’s diagnosis. It is the essential step before jumping into a program that may be on the wrong subject, for the wrong people, at the wrong time.

FOCUSING THE SUBJECT

The first step in a needs analysis is to focus on a manageable subject. No matter how the idea for a training program has arisen, the training department should do some preliminary probing and listening to get the subject in focus.

In this first step, you should establish clearly who is the likely audience for the training and generally what the topics are.

It is too difficult to start with “everybody” and “develop a total program.” Instead, restrict the analysis to persons in the same job – sales representatives, newly appointed district managers, hospital sales representatives, etc., and generally establish the topics – sales skills, management skills, product knowledge, etc.

Triumph and disaster

Consider the two examples below. In the first, the training manager has correctly focused on the needs analysis. In the second, the training manager has gone off on an unplanned, exploratory expedition.

EXAMPLE 1

A newly appointed training manager has been given the assignment of ensuring that the sales force has the training it needs. The first step he/she takes is to talk informally with some of the sales managers and in more depth with his/her supervisor. They find out that the highest priority is the training of newly hired sales representatives. Accordingly, he/she proposes a needs analysis to determine the scope and content of a program for newly hired sales representatives.

Likely result: A successful training program

EXAMPLE 2

A newly appointed training manager has been given the mission of ensuring that the sales force has the training it needs. He/she knows from their own experience in the field that many of the managers lack good management skills. He/she also knows that some senior sales people are just going through the motions and are not really applying themselves. Accordingly, he/she plans a broad-based needs analysis to get at the root of the problems.

Likely result: Disaster

Focusing builds support

This preliminary focusing does more than help direct your efforts – it builds support for your final program. If you propose a program because you say it is needed, you may find yourself in an unpopular position. It then becomes hard to schedule sessions, and it is hard to conduct successful sessions.

On the other hand, if your focusing efforts develop a consensus that a particular audience and topic represent a priority training need, gaining organizational support for your program is often easy.

The persons you contact for your preliminary focusing effort should be those whose judgment you respect and those who have a voice in the final decision about the training program. Don't ever neglect the value of these early contacts in building and cementing relations.

A proper focusing effort should result in a practical subject for a needs analysis and one that the field have expressed interest in. Here are some typical, focused subjects for needs analyses:

- Product knowledge for new hires
- Selling skills for new hires
- Advanced selling skills for experienced sales representatives
- Management skills for sales managers
- Time and territory management for sales representatives
- Sales call planning skills for sales representatives

PLANNING THE FACT GATHERING

Before making any contact with the field for fact gathering, prepare yourself with all the available relevant information. Anything you gather ahead of time saves time and trouble in the field. Use your field time for gathering information that is available only from the people and from your observations.

The purpose of your fact gathering is to determine four things:

- The audience for the proposed program
- The timing of the program – when and how long
- The specific content and where the emphasis should be placed
- How the training should be delivered

The audience

The audience for the proposed program will have been tentatively identified at the start, but you may find that your hypothesis has to be modified, perhaps to broaden your audience definition or to narrow it.

EXAMPLE

A training manager conducting a needs analysis for product knowledge training for new sales representatives finds that there are two distinct groups of trainees – those with science degrees and those without technical training. He/she concludes that there should be two different programs for the two audiences.

The timing

The timing of the program is often critical. Only so much time will usually be devoted to training. During the needs analysis, you should determine what an acceptable length will be. You should also determine when in the calendar is best for training. There may be certain times of the month or year that are particularly suitable. The training population itself is not the best source of this information. Generally, their bosses make that decision and are the ones to consult.

EXAMPLE

The training manager, analyzing the need for training of new hires, sees from the recent compliance test that they must pass that they need product knowledge. His/her fieldwork shows that it is equally important that they are trained in selling skills at the same time.

Specific content

The specific content of the program, to be determined during your analysis, will not be a complete surprise. When you begin analyzing a group for its training needs, start with their performance standards. That will give you a basic idea of their needs. Your analysis will refine that, identify strengths and weaknesses, and show where to place emphasis.

EXAMPLE

A training manager conducting a needs analysis among experienced sales representatives knows from their performance standards that they must be able to make hospital calls. While fact gathering, he/she determines that most reps would like to know more about how hospitals are organized and who makes decisions in them. He/she decides to include this information in the program.

Delivery

How the program is to be delivered is the final thing to be determined during a needs analysis. Your normal choices will be:

- Workshop – a meeting of the people to be trained. This could be free standing or it could be tagged onto a cycle meeting or regularly scheduled meeting.
- Home study – reading and exercises, web based, and CBT done at home. This is a hard way to train a large group, like a sales force. It may be the only way to train an individual like a hospital specialist. As preparation for a workshop, home study, distance learning or even reading by itself can be an effective time and money saver.
- On-the-job – conducted by the trainee's manager while he/she is working. This should be part of every program, but it is not an easy way to ensure uniform training of a group if it is the only method employed.

In a typical situation you'll use a combination of these three methods to do your training. Your analysis may well determine what portion of the training can be accomplished by a workshop, what portion by home study and distance learning, and what can be expected from on-the-job training.

GATHERING THE FACTS

In this step of a needs analysis, there are four issues –

- Confidentiality
- Who to contact
- How to contact
- Controlling the information gathering

Confidentiality

The information you gather for your needs analysis is purely for the purpose of planning a training program. You are not conducting performance appraisals nor are you spying.

You will be able to develop the information you need because people trust you to maintain in confidence what they tell you. You have to earn that trust by keeping confidential what an individual says or does during a needs analysis.

Of course, your findings include what you have observed and what you have been told. But these findings must be stated as general information, not related to an individual.

Make clear that you are keeping information confidential:

- Written questionnaires should say at the top, “Don’t sign this.” And there should be no place for signature, name, district, etc. Consider having the questionnaires sent to a neutral location – for example a consultant or an agency. The same rules should apply when using on line survey tools.
- Any paper or computer document used for note taking during interviews should not include the name of the person interviewed. The questions asked should identify the person adequately for needs analysis purposes. Thus, you’ll know later that the respondent was experienced, for example, without having the notes labeled with a name.
- In conversations, avoid mentioning your experiences from other areas or repeating someone’s remarks. Your comments on your findings belong in your report and nowhere else.

Who to contact

You should have contact with everyone in the chain of command above the sales representatives, and you should have contact with a sample of sales representatives themselves.

Chain of command contact is for two purposes:

- To inform all of them of your plans
- To gather information from a sample of them

This is a sample of management to gather information from:

- If there are about 5 people, see all of them
- If there are about 10, see half of them
- If there are 20 or more, see 25% of them

Sales representative contact is with a minimum of 5 people. If the sales force is larger than 50, plan to visit 10-15% of the total. If you want a broader sample, send a questionnaire to the entire sales force.

All samples – managers and sales representatives – should reflect the geographical and marketing mixture of the total training population.

For example, if a company has 5 distinct regions each with certain individualities, the training manager would probably include a sampling of people from each region for the needs analysis. If some territories were urban and some rural, samples of both would normally be included. If some of the sales force were experienced and some relatively new, the needs analysis should include a sample from both groups.

How to contact?

Informing the chain of command of your plans can be done by email or by announcement if a convenient meeting is already scheduled.

Gathering information should be done by:

- Personal interview
- Focus group
- Questionnaire

Management interviews should be conducted in private, preferably away from the office to avoid interruptions. You should allow 2-3 hours for each interview.

Fact gathering from representatives should be done by visiting them on-the-job and observing their sales calls, conducting interviews between calls. Spending a full day with each sales representative is best; if time is a major factor, a half-day will suffice.

Focus groups are small-guided discussion sessions – 2 to 3 managers together or 2 to 3 sales representatives together for 2 hours or so. You serve as discussion leader and note taker. Obviously you'll contact more people this way, but you'll get more group thinking than individual thinking. Focus groups are a good supplement to personal interviews.

Using a qualified outside person to conduct some of the interviews is a means of both saving your time and gaining a second – and objective – view. The person selected for this must be experienced at the task and willing to work closely under your guidance.

Controlling the information gathering

In the course of your needs analysis, you'll be talking to perhaps a dozen or more people, and examining written data from another dozen or more. If each person simply volunteered freely what he thought, you'd wind up with a hodgepodge of ideas.

EXAMPLE OF HODGEPODGE

Respondent 1: I think we should stress benefit selling

Respondent 2: Motivation is the key – a hungry salesperson is the best salesperson

Respondent 3: We don't do enough with visuals. We need more materials of all kinds.

Respondent 4: Let's have the training early in the morning

Using questionnaires and interview guides solves most of these problems and helps keep your information gathering on track. It also makes information gathered by two or more people easier to combine.

Questionnaires and interview guides are about the same. The difference is that the questionnaire must stand on its own and call for a complete answer. An interview guide covers the same ground, but in a headline style so that the interviewer can ask questions in a more casual way. The interview guide also serves as an outline for small group fact-finding sessions.

If your fact gathering includes observation of calls, you should also use an observation checklist. If you have a coaching checklist, that would be suitable. Otherwise prepare one based on an advanced selling skills program.

PREPARING A REPORT

Once all your data are collected, you can analyze it. If another person has participated in the collection, you would normally invite their participation in the analysis as well.

You can look at your data in two ways:

- Examine each person's answers to all questions
- Examine all respondents' answers to each question

From these answers, you should be able to ascertain some common ground leading to a training program. That common ground, buttressed by your personal observations, is the basis for your report.

Your report should be in writing and written so it could be understood by a wide audience – it may get more circulation than you think.

Generally, three headings are called for in the report:

- Purpose of the needs analysis
(To determine the need for and parameters of a training program for experienced sales representatives...)
- Findings
(There is a strong need for training in selling skills, especially probing, listening...)
- Recommendations
(A three-day workshop should be held in July... Costs are estimated as follows...)

Your report has the best chance of getting a favorable reception if you present it orally to the people who will collectively make the decision. You can tailor the presentation to each person present and you can answer any questions.

Your presentation outline should match your report. As with any presentation, visual aids add greatly to the impact.

TYPICAL INTERVIEW GUIDE FOR SALES REPRESENTATIVE

Personal information

Sales experience

Training

Territory

Size, physician mix, hospitals, economics

Calling Pattern

Frequency, length, account classification

Major sales problems

Major sales opportunities

Principal objections/obstacles encountered

Hospital sales status

Key account status

Sales training suggested by rep

TYPICAL INTERVIEW GUIDE FOR SALES MANAGER

Personal information

Experience

Training

People managed

Number, experience, geographical dispersion

Field schedule

Time in field, with reps, personal selling

Administration

Time, where done

Sales meetings

How often, length, how handled

Recruiting and hiring

How handled, time spent, problems

SAMPLE REPORT OF NEEDS ANALYSIS

Purpose of the needs analysis

A report from the Human Resources Department showed that 45% of our sales representatives were leaving our employ before completing 3 years of service. Most of these stayed with us one year, completing their basic training, and really just becoming productive. Reports from the field also emphasized that turnover was high among promising young sales representatives. Individual managers have pointed out that in some cases, the person they had recruited to balance their age groupings had not stayed long enough to be a factor in long-range personnel planning.

During exit interviews, sales representatives gave vague and widely differing reasons for their leaving. Details of these interviews are available from the HR Department. In general, there was some dissatisfaction with the opportunities they saw for growth. The national sales manager and several regional managers have expressed their opinion that there is additional training of new people required.

Findings

A needs analysis was conducted during March and April. Six managers were interviewed, 12 sales representatives were observed and interviewed. The representatives have all had four years or less of service. Anonymous questionnaires were sent to 55 additional representatives, 36 of who responded. There is a strong consensus from all sources contacted that the new rep feels somewhat abandoned after being in the field for a year or so. In general, the respondents felt that the initial training was adequate, but it didn't prepare the sales representative for the problems he/she faced as they got to know their territory and as the demands on them increased.

Respondents listed the following suggestions for training:

- Advanced selling skills
- Understanding physician behavior
- Psychology of selling
- Determining physician needs
- How doctors make decisions
- Selling the difficult doctor
- Professional selling

Observations of sales calls supports the need for additional training in these areas, especially:

- Observation skills – body language, physician behavior
- Determining needs – probing and listening

Recommendations

For existing sales representatives – Two half-day modules to be conducted for all sales staff in conjunction with their next two scheduled cycle meetings. Subject: Advanced selling skills, with emphasis on determining and meeting physician needs.

For newly hired sales representatives – One year after their hire, new sales representatives should be brought back to headquarters for a three-day workshop. Subject: Advanced selling skills, with emphasis on determining and meeting physician needs.

ANALYZING PERFORMANCE PROBLEMS

When conducting a needs analysis, you'll often come upon performance discrepancies that don't immediately suggest a training solution. It is important to recognize those discrepancies that cannot be dealt with by training and make a determination of the correct solution. It may be that the proper course of action is beyond your scope of responsibility.

If the discrepancy is not within your job responsibilities, you may include your findings in your report but leave recommendations to other, more directly involved people.

When you find a performance discrepancy, follow this outline:

1. Identify the nature of the discrepancy. Once its nature has been identified, the importance of the discrepancy can be considered.

Ask these questions:

- Why do I think there is a training problem?
 - What is the difference between what is being done and what is supposed to be done?
 - What is the event that causes me to say that things are not right?
 - Why am I dissatisfied?
2. Why is it important?
A performance discrepancy has been identified and you must decide if it is important enough to warrant taking action. This is a decision that you and management must make.

Answer the question, "What would happen if I left it alone?"

If the result of letting it alone would be minor, leave it at that. If the result is substantially larger than nothing, go to the next step of the analysis.

3. Is It A Skill Deficiency?

You must decide in this step if the performance discrepancy is due to skill deficiency. What we are saying is, are nonperformers not performing as desired because they do not know how to do it? If their lives depended on it, would they still not perform?

If there is a real skill deficiency, then the primary remedy must be to either change an existing skill level by teaching new skills or to change what people are required to do.

But if people are able to perform but do not, the solution lies in something other than the improvement of skills. "Teaching what is already known is not going to change anyone's skill level."

The remedy in these cases is to change the conditions under which people are expected to do that which they already know how to do.

To determine if the discrepancy is due to a genuine skill deficiency, ask these questions:

- Could the person do it if he/she really had to do it?
- Could the person do it if his or her life depended on it?
- Are the person's present skills adequate for the desired performance?

4. Yes, it is a skill deficiency.

A. Could they do it in the past?

A performance discrepancy exists and is considered important. It has been determined that it is a genuine skill deficiency.

So the next thing that we have to do is to ask: could they do it in the past?

Being able to determine whether a lack of skill is due to a form of forgetting or to a lack of training is one of the more important decisions in the analysis of performance discrepancies. It is also one of the most neglected decisions.

In many cases when it is obvious that a skill deficiency exists and that a person has never had the skill, the solution is not necessarily a formal training program.

To determine if the skill once existed, ask these questions:

- Did the person once know how to perform as desired?
- Has the person forgotten how to do what I want done?

- B. Is the skill used often?
- How often is the skill or performance used?
 - Is there regular feedback on performance?
 - Exactly how does the person find out how well he or she is doing?
- C. Is there an easier solution?
- Can I change the job by providing some kind of job aid?
 - Can I store the needed information some way (in written instructions, checklists) other than in someone's head?
 - Can I show rather than train?
 - Would informal (such as on the job) training be sufficient?
5. No, it is not a skill deficiency. They could do it if they wanted to.
- A. Is desired performance punishing?
- B. Is nonperformance rewarding?
- C. Does performance really matter to them?
- D. Are there obstacles to performing?
6. What should we do now?
- A. Have all potential solutions been identified?
- B. Which solution is most practical, feasible, and economical?



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