

Planning a Needs Assessment

This worksheet can help you investigate: 1) the business problem and its causes, 2) potential solutions to the problem, 3) how much support there is for training, 4) if training is a good solution to the problem, and 5) whether to proceed with a detailed needs assessment.

Name: _____ **Organization:** _____ **Date:** _____

Business Problem/Opportunity: describe the situation that merits investigating potential training needs.

Business Sponsors: position(s) of people who would sponsor the training/HR services and approve training/HR plans.

Target Audience: characteristics of learners who might need training/HR services, numbers of target audience, location, etc.

Requirements/Constraints of Conducting a Needs Assessment: (time to implement, budget constraints, receptiveness towards training/HR of managers/trainees, etc.)

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.

Possible Methods to Assess Needs: focus group, questionnaire, advisory group, etc.

Needs Assessment Methods	Method/Approach	Concerns
1.		
2.		
3.		
4.		

Who would you want to investigate (talk with, survey, observe) in order to uncover training needs? (List all groups)

What methods would you use for each group? What would you do first, second, third?

Group	Method/Approach
1.	
2.	
3.	
4.	

Overall, what do you expect to work well about your approach to discovering training needs?

- 1.
- 2.
- 3.

What do you think might go wrong or cause problems now or in the future, based on your approach to discovering training needs?

- 1.
- 2.
- 3.