**Learning Needs Analysis**



In this article Sarah Cook explores what is Learning Needs Analysis (LNA). She focuses on its importance in the learning cycle and its relevance in identifying performance gaps.  Whether a newly appointed trainer or consultant or someone experienced in the role, this article provides practical advice and sets the framework for meaningful and effective learning needs analysis.

**What is Learning Needs Analysis?**

Learning needs analysis (LNA) is the name given to the data gathering and analysis exercise that takes place at the beginning of the learning cycle.  A common mistake by inexperienced trainers is to spend too little time on the needs analysis phase. This in fact is a key step in the learning cycle. The latter is often represented  by the ADDE model: Analyse, Design, Deliver, Evaluate.

**Learning Needs Analysis**

The learning needs analysis is the data-gathering element of the system. Here managers, consultants, trainers and other HR professionals assemble information about the development need. The resultant information and its analysis identify the nature of the need. The outputs of the LNA drive the design of the intervention to address the need and the subsequent delivery of this. In addition the LNA has an important part to play in the evaluation of the effectiveness of the intervention.

**Design**

Working from the specifications derived from the LNA, design is the stage where designers create the outline and detailed content of the learning intervention. During the design stage the course designers write and agree with the project sponsor the learning objectives. They construct the detailed course content and the lesson plan.  Another output of this stage is the handouts, slides and other training material that are required to support the programme.

**Delivery**

The delivery phase of the project is when the design is implemented. This intervention can take many forms from e-learning, workshops and seminars through to one to one coaching. When delivery is on a large scale, there is also the need for quality assurance in this phase of the cycle to ensure consistency of approach.

**Evaluation**

Evaluation is an important phase in the cycle, used to gauge the degree to which the desired learning outcome has been met in terms of individual and business benefits. Many businesses fail to put sufficient emphasis on this phase of the cycle, confining it to the 'too difficult' or 'nice to know' rather than 'need to know' box. Alternatively, too many organizations confine this phase to validation of the learning e.g. happy sheets or learning reaction forms, which bear little correlation with the transfer of learning to the workplace and business benefits. Yet, if a thorough learning needs analysis has been undertaken, it can become a key driver of this phase in the cycle. The LNA establishes desired outcomes of the learning both in terms of individual changes in knowledge, skills and behaviour as well as organizational benefits. These performance indicators can then be measured post the learning intervention in order to assess its success and business benefits; an invaluable tool in deciding which learning interventions to carry forward as well as promoting the business benefits of the development.

**Establishing learning needs**

Increasingly more emphasis is being placed on the thorough establishment of learning needs in order to ensure that training and development interventions are 'fit for purpose'. There are three sources of data that can be used to establish learning requirements: individual needs, departmental or operational needs and organizational or strategic needs.

**Three levels of need**

Organisational (Strategic)

Departmental (Operational)

Individual

There follows a brief description of each:

**Organisational (strategic level)**

At a corporate level, training consultants need to gather data to identify the organisation's future learning and development needs. Typically these are linked to the organisation's strategic plans and identify business-wide development needs. Often created as part of the annual planning phase, an organizational LNA identifies the development interventions that are required to support the attainment of business strategy, organizational objectives and key performance indicators.

Typically this type of LNA is conducted in consultation with senior managers. It focuses on the link between the business outputs and the learning need.  The emphasis of this LNA is on development that is required across the business.  In  order to achieve this the training consultant needs a good understanding of company vision, mission, strategy and objectives as well as performance indicators. They need to be aware of the factors affecting the organization that can bring about change such as political, economic, socio-cultural, technological, technological and environmental factors. They need to be able to work with senior managers to produce a SWOT (strengths, weaknesses, opportunities and threats) of the organization's capability.

The type of questions that are posed to identify organizational need are:

• What factors external to the organization will affect the organisation's capability requirements in the longer term?
• What learning and development is required?
• What are the business reasons for the development to take place?
• What is the overall aim in undertaking this development?
• What are the expected outcome(s)?
• How does this link to the strategic plan?
• What business issues are you aiming to resolve?
• How does the learning support the intended business outcome?
• What is the link to Key Performance Indicators?
• What is the expected return on investment linked to the business objectives?
• How could this result be evaluated?
• How does this learning need fit in with other organizational initiatives?

So for example, one business working in a highly competitive marketplace identified as a strategic aim, the requirement to increase customer satisfaction and retention. To support its strategy a culture change programme was proposed which had specific KPIs around producing a demonstrable increase in internal as well as external customer satisfaction. The LNA undertaken by the learning and development department identified a requirement for a company wide service leadership programme.  It was intended that the learning would support the intended business outcome by helping managers throughout the business take steps to improve the quality of service they provided their customers. This was measured by internal employee surveys as well as external customer satisfaction scores. The intervention was intended for the leadership population of the entire organization.

As a result of this need being identified, the training and development team were able to set some key objectives for the leadership development programme and specify the key measures of success. The LNA resulted in a brief being written and a tender document prepared to invite training providers to put forward proposals to address the need.

**Departmental (operational) LNAs**

Organisational LNA because of its strategic nature tends, as stated earlier, to be linked to the strategic planning cycle.  Training consultants and HR business partners are involved in the identification of departmental or operational LNAs, either during the strategic planning phase, or, as is more often the case, as and when the departmental learning need arises. Often driven by the operational needs of the business, departmental LNAs allow the training consultant to identify development needs across a departmental or functional area. Again, these requirements should be linked to business outcomes.

Typical questions that can be asked during an operational LNA are:

• What business issues are you aiming to resolve?
• What are the specific objectives to be achieved?
• Is this problem related to gaps in skills knowledge or behaviour or a combination of these?
• How would this result support the intended business outcome?
• What is the expected return on investment linked to your business / team objectives?
• How could you evaluate this result?

The Finance function of a telecommunications organization for example, identified a lack of cohesiveness in the team. Symptoms were that departmental team members lacked a shared understanding of their collective goals, conflict and disagreement were not aired and issues were being 'swept under the carpet'. Customers and internal colleagues received differing levels of service and there was a perceived lack of consistency in the team. The subsequent departmental LNA identified a need to build a more cohesive team, to develop a shared vision of the future and a common set of team values.

**Individual LNA**

Both the line manager, HR Business Partner and training consultant may be involved in the identification of individual learning needs.

At this level it is important to establish what skills, knowledge and behaviours the individual needs to change, develop or improve. In helping an individual establish their learning needs, training consultants and line managers can help make the link for individuals between what they want to achieve and the business goals.  Useful questions for line managers and training consultants to ask the individual are:

• What are the future business priorities?
• How might these affect the role that you play?
• What skills, knowledge or behaviours may you need to demonstrate or acquire more of in the future to meet these needs?

In addition to one to one interviews and questionnaires, other mechanisms that can be used to establish individual learning needs are observation,  360 degree feedback and self assessment.  I will talk more about how these techniques can be applied in later articles.

A further method for establishing individual needs is Personal Development Plans. Increasingly organizations encourage individuals to produce personal development plans (PDPs). These can be a useful source of data to identify individual development needs.

What specific skills, knowledge or behaviours need to be developed? What will be the expected outcome/benefit? How will you acquire this? By when What support do you need?
Typical headings in a Personal Development Plan

A learning needs analysis undertaken at an individual level needs to benefit both the person concerned and ultimately the organization through improved outputs and increase in performance.. It can do this by identifying gaps in desired versus actual performance. There are three areas that development can focus on for the individual: skills, knowledge and behaviour.  Skills are the competencies that a person needs to demonstrate to be effective in their job role. For example, a customer service agent may need to demonstrate:

• Effective listening and questioning skills
• Problem solving skills
• Complaint and conflict handling skills

They will need knowledge of the IT systems they need to use in their jobs, the structure of the organization in order to know points of referral throughout the business as well as a thorough knowledge of the products and services the organization provides.

Behaviours are what other people, colleagues and customers see when they interact with the individual.  Asking the individual and gaining feedback from line manager, direct reports, colleagues and internal and external customers is a way of establishing what behaviours the individual needs to change, show more or less of.

Many organizations have behavioural frameworks that provide guidelines on how individuals should behave. These are often underpinned by a set of values or principles that denote 'how we work around here'. So, for example an organization may have the value of 'team work' and have a defined set of behaviours such as:

• Offers support to team members and colleagues
• Shares knowledge and experience
It is possible to use these behavioural criteria to identify areas of personal development needs.

What about attitude? Is it possible to identify learning needs in this area?

Behaviour =What we do and say

Attitude = Values and Beliefs

Often managers express gap in performance as 'poor' or 'bad' attitude. In order to evaluate the effectiveness of the learning intervention, the training designer needs to write and agree learning objectives that are measurable and observable. Attitude, like values and beliefs is often depicted as an intangible, hidden below the waterline, it surfaces through our behaviour. So, a poor attitude towards the customer is evident in inattentiveness to customers' needs and promises not being kept for example.  Managers may say that a team member has a 'bad attitude', my suggestion if you are trying to establish a development need is to closely question the manager to establish:

• What behaviours need to change?
• What does the individual need to stop doing?
• What does the person need to do start doing or do more of?
• What evidence do they have of this, and if not, how can they or you gather the evidence?

**Outputs of the LNA**

The outputs of the LNA at whatever level it is undertaken, help inform the design phase of the learning cycle. The LNA needs to be sufficiently robust and thorough to allow other people to readily se the outputs as often different trainers or consultants may be involved in designing the learning intervention.

A review of the LNA informs the ten key steps in this phase:

**1.** Setting or reviewing  terminal objectives for the learning and development.

Terminal objectives describe the desired end outcome of the learning intervention. They are written by considering the changes in behaviour, skill, knowledge that the individual learner will have made at the end of the training intervention. These should be measurable and observable. An objective that cannot be measured or observed does not lend itself to evaluation. This significantly diminishes the usefulness of the objective.

Objectives statements should be worded in the format "By the end of the workshop participants will be able to\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_"

The statement must not use verbs such as learn and understand because there is no way to measure or observe them. Behaviour needs to be observable and measurable. For example verbs like create, write, list, construct, and repair are observable, measurable, and suitable for statements of behaviour in written objectives.

A frequently used acronym to remember the elements of a terminal objective is SMART. For training objectives this translates as follows:

• Specific: the objective states exactly what the learner will be able to do as a result of the course
• Measurable: changes in skills, knowledge and behaviour can be observed and measured on return to the workplace
• Achievable and Active: the objective is achievable. It is also written in a way that includes an active verb in the objective so that this can be measured e.g. 'By  the end of the workshop you will be able to describe the difference between skills, knowledge and behaviour', rather than 'you will be able to understand'
• Relevant: the objective is relevant to the needs of the learner and of the organisation
• Time-bound: the objective is achievable by the end of the learning intervention

**2.** Building course content into separate elements or learning sessions that help the learner achieve the terminal objectives.

**3.** Devising session objectives

It is also best practice for session objectives to be written ? these are the SMART objectives for each session. Again they are written in the format "By the end of the session participants will be able to\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_"

It is best practice to describe what the delegate will be able to do by the end of a specific training session. The attainment of session objectives moves the learner towards the achievement of the terminal objectives once the programme has been completed.

**4.** Putting the learning sessions into a logical order that makes sense to the learner and is easy to follow

**5.** Designing  appropriate training methods for each learning session taking into account different learning styles and the methods of learning that best correspond to them

**6.** Arrange timings of the intervention to ensure that a climate of support and challenge is encouraged and that the sessions are neither too long nor too short

**7.** Developing appropriate trainer notes to support the intervention and to ensure consistency of approach if the programme is going to be delivered by more than one trainer

**8.** Developing supporting training materials such as case studies, notes and handouts

**9.** Designing appropriate evaluation measures that will assess how much learning has been acquired, how well it has been transferred to the workplace and the extent to which the individual and business has benefitted

**10.** Gaining buy-in and approval from the project sponsor to the proposed design as well as that of other key stakeholders.

Skills, knowledge and behaviour needed to undertake an effective LNA

Undertaking a thorough learning needs analysis therefore is a pivotal activity. Failure to completely identify the true learning and development need and its relevance to the business has a detrimental knock-on effect to the rest of the learning cycle.

In order to undertake a LNA, the training consultant needs to engage their stakeholders and plan the project. This means they have to possess good planning and analysis skills. They need to also communicate the rationale for the LNA effectively to employees as well as gaining buy-in to the idea at a senior level.

In order to select the most appropriate method of analysis the trainer must have an understanding of the LNA methods, their range and function. For example, when is it best to use assessment centres to establish learnng needs as opposed to casual interviews?

An underpinning knowledge of the organisation?s vision, values and competency framework is also essential as is familiarity with support systems such as LMS (Learning Management System) - on-line support that can help the trainer both in the analysis and capture of data  and its subsequent storage.

To be effective in LNA, the training consultant needs to also possess sound consultancy skills and to be able to interact with a wide range of people in an appreciative manner.  Their sampling, observation and analysis skills also need to be effective as do their reflection skills.

In summary, Learning Needs Analysis is a key step in the learning cycle. It needs to be approached in a thorough and rigorous manner as it drives the outputs of the rest of the learning cycle. In the subsequent articles in this series the author will provide practical guidance and advice on how to undertake an effective learning needs analysis.

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**Key Learning Points**

• Learning Needs Analysis is a key step in the learning cycle and it is well worth spending time to undertake a thorough assessment of need during this phase
• The data gathered drives the nature of the learning intervention, the subsequent design, delivery and evaluation phase
• There are three levels of learning needs analysis that can be undertaken - organisational, operational and individual
• The focus in LNA should be the identification of performance gaps related to skills, knowledge and behaviour
• When an 'attitude problem' is identified as a learning and development need, questions should be asked to establish quantitative and observable evidence of this need
• The outputs of the LNA should inform the creation of terminal objectives for the development intervention

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