

1. TNA OVERVIEW
2. WHY TRAIN
3. POSITION ANALYSIS TEMPLATE BOOK
4. TRAINING ASSESSMENT PPT



Provided by the ESBL Group – Corporate Training Division

TRAINING NEEDS ASSESSMENT OVERVIEW

TRAINING NEEDS ASSESSMENT

The purpose of a training needs assessment is to identify performance requirements and the knowledge, skills and abilities needed by an organization's workforce to achieve its objectives. An effective training needs assessment will help to direct resources to the areas of greatest demand. The assessment should address resources needed to fulfill the organization's mission, improve productivity and competitiveness, and provide quality products and services. A needs assessment is the process of identifying the 'gap' between performance required and the current performance. When a difference exists, it explores the causes and reasons for the gap and methods for closing or eliminating the gap. A complete needs assessment also considers the consequences for ignoring the gaps.

There are Three Levels of a Training Needs Assessment:

- **Organizational assessment** evaluates the level of organizational performance. An assessment of this type will determine what skills, knowledge and abilities a company needs. It determines what is required to alleviate the problems and weaknesses of the company as well as to enhance strengths and competencies. Organizational assessment takes into consideration various additional factors, including changing demographics, political trends, technology and the economy.
- **Occupational Assessment** examines the skills, knowledge and abilities required for affected occupational groups. Occupational assessment identifies how and which occupational discrepancies or gaps exist, potentially introduced by the changed or new direction of the company. It also examines new ways to do work that can eliminate the discrepancies or gaps.
- **Individual Assessment** analyzes how well an individual employee is doing a job and determines the individual's capacity to do new or different work. Individual assessment provides information on which employees need training and what kind.

TRAINING NEEDS ANALYSIS

Effective training or development depends on knowing what is required for the individual, the department and the organization as a whole. With limited budgets and the need for cost-effective solutions, all organizations need to ensure that the resources invested in training are targeted at areas where training and development is needed and a positive return on the investment is guaranteed. Effective training needs analysis TNA is particularly vital in today's changing workplace as new technologies and flexible working practices are becoming widespread, leading to corresponding changes in the skills and abilities needed.

Analyzing what the training needs are is a vital prerequisite for any effective training program or event. Simply throwing training at individuals may miss priority needs, or even cover areas that are not essential. TNA enables organizations to channel resources into areas where they will contribute the most to employee development, enhancing morale and organizational performance. TNA is a natural function of appraisal systems and is a key requirement for overall organizational success.

Managers today are often responsible for many forms of people management, including the training and development of their team, and should therefore have an understanding of training needs analysis and be able to implement it successfully.

Effective TNA involves systematic planning, analysis and coordination across the organization, to ensure that organizational priorities are considered first, that duplication of effort is avoided and economies of scale are achieved. All potential trainees should be included in the process, rather than to rely on

subjective evaluation of managers. Ideally, managers should also receive training in the process of TNA itself, to clarify what they are trying to achieve and what their approach should be.

DEFINITION

A training need is a shortage of skills or abilities, which could be reduced or eliminated by means of training or development. Training needs hinder employees in the fulfillment of their job responsibilities or prevent an organization from achieving its objectives. They may be caused by a lack of skills, knowledge or understanding, or arise from a change in the workplace.

Training Needs Analysis identifies training needs at the employee, departmental or organizational level in order to help the organization to perform effectively. The aim of TNA is to ensure that training addresses existing problems, is tailored to organizational objectives, and is delivered in an effective and cost-efficient manner.

Training Needs Analysis involves:

1. Monitoring current performance using techniques such as observation, interviews and questionnaires
2. Anticipating future shortfalls or problems
3. Identifying the type and level of training required and analyzing how this can best be provided

Action Checklist

Training needs can be sorted broadly into three types:

1. Those you can anticipate
2. Those that arise from monitoring
3. Those which result from unexpected problems

- **Ensure that the identification of training needs is integrated across the organization**

Training needs discovered in one department are likely to exist in others. It is pointless for individual managers to throw their own limited resources at each problem as it arises, duplicating efforts and dissipating energy.

Most organizations have a personnel function which organizes training delivery. You may not be the person responsible for coordinating the system, but you have an important role to play in collecting the best information you can on the training needs of the people who work for you and passing it up the line. At the very least, liaise with other managers to aggregate training needs information, so that a range of appropriate training and development activities can be planned.

- **Anticipate future needs**

Training needs often appear at the organizational or activity level. For example, new office machines or workshop equipment may well have training implications for everyone using it.

Alternatively, an organization that decides to enhance its level of customer service as a part of a corporate strategy knows that a program of training and development is essential for its success.

- **Develop monitoring techniques**

Some training needs can go unnoticed because they creep up on the organization gradually. Active monitoring systems are essential to spot these and can make a valuable contribution to the process of collecting information on performance gaps and training needs.

In TNA, performance standards and indicators are set as specifically as possible. Asking questions at appraisal interviews can act as a form of survey, as the same issues are being addressed throughout the organization. Identifying training needs is one purpose of an appraisal.

In addition to training needs that emerge as a result of an appraisal interview, a worthwhile approach to investigating one/off problems is to interview staff and customers. Regularly ask a random sample of people for their views on the same set of questions relating to general performance / for instance customer satisfaction levels.

- **Investigate unexpected problems with care**

Monitoring will indicate where gaps and problems exist. However, it is possible to make the wrong assumption when faced with a particular set of circumstances. For instance, unusually rapid staff turnover in a small section may lead to a conclusion that unsocial hours worked there are the issue. However, staff exit interviews may indicate that turnover is a result of cramped working conditions and poor ventilation / issues that training cannot resolve, even though the monitoring process has helped identify the problem.

On the other hand, it could be that:

- **The behavior of the supervisor or manager is the root cause**
- **Errors at the recruitment stage mean that unsuitable people are being hired**

In either of these cases there is a training need / in the first case, with the manager, and in the second, with those doing the recruiting. This could include you, if you have something to do with the recruitment and selection process.

- **Identify the level of need**

It could be that a training need is limited to a single individual or activity but it is more likely to be relevant for a number of people, a whole department, or across the organization.

- **Consider what type of training will be most appropriate**

Consider whether the training needs can be met by using internal expertise or whether external assistance will be necessary. Will informal training be suitable or are formal training courses required? Take into account the number of people to be trained and the resources available.

- **Take appropriate action**

If the training needs are within your own span of control, probably at individual or maybe at activity level, you can plan action to meet the needs. If the needs are broader, you will need to make recommendations and proposals to those responsible for planning and implementing training interventions in your organizations. This may involve drawing up a report specifying the training needs you have identified, your recommendations for meeting them and the expected benefits of the training.

Managers should avoid

- Making snap assumptions about performance problems
- Organizing training without first establishing a need
- Taking a one-size-fits-all approach. A course which one person found helpful will not necessarily meet the needs of a diverse group of individuals.
- Focusing on obvious training needs at the expense of those which may only be discovered through systematic monitoring.

ORGANIZATIONS

There are some things you can put in place that will make it easier to carry out a TNA. Here are some questions you can ask to help you to identify what those are.

- Do we have a strategic and operational plan?
- Do we have an appraisal system?
- Do all staff have up to date job descriptions?
- Do all staff have written objectives?
- Do we have a competency framework?
- Do we have a training strategy or statement of commitment supporting training and learning?
- Do we have effective formal and informal consultation processes across the organization?

The more questions you can answer 'yes' to the easier it will be to carry out, implement and evaluate a TNA. ESBL has developed diagnostic tools to help you identify and meet your organizational training needs. We help you to identify or develop the organizational processes that support training and learning and signposts you to our external resources that can help you to close the gaps.

We have a formal performance management process which includes development planning. The development plans inform the training needs analysis / as does any strategy that may bring the clarity to a new direction or skill set that we feel should be trained to all members of your organization.

Strategy and Objectives

If you don't already have a strategy in place then your training needs analysis needs to start with defining your organizational strategy and objectives. ESBL can help you to define your organization's goals and develop your strategic plan.

Once you have a clear picture of the organization's strategy you can review the knowledge and skills needed for the organization to achieve its objectives and address any weaknesses.

Use a SWOT analysis to identify the strengths, weaknesses, opportunities and threats facing your organization. Then ask the following questions about the skills, knowledge and behaviors in your organization. You can do this exercise with your senior management team. You may also want to include other staff when thinking about the knowledge within your organization.

Skilled Managers

Line managers need to have the necessary skills to work with staff to help them to identify their training needs and the knowledge about how to meet them.

Having managers with the core competencies to carry out a training needs analysis of their team is partly about recruiting managers with those competencies and partly about supporting your managers to develop these skills, including providing training for them.

If senior management and line managers can appreciate and become enthusiastic about the value of learning and development for themselves and others, this sets the tone for the organizations. The Management/Leadership Business Studies Team at ESBL can help with ideas and opportunities for developing leadership. We can offer you skill upgrading programs specifically developed for your organization and the individual, we can offer Cambridge University vocational business courses and we can offer full and part time post secondary MBA and MSc in Management program resulting in an official and highly-respected British MBA.

Prioritizing Learning Needs

Once you have identified learning needs across the organization, you then need to prioritize them. Answering these questions will help you to prioritize your training needs:

- What impact will developing these skills have on our performance?
- What would be the costs and benefits of investing in developing these skills?
- Which skill needs are the most important to your organization's long term success?
- Which skill needs are the most important?

You should record the decisions you make when analyzing the costs versus the benefits of developing these skills in a quantifiable way / such as on a spreadsheet. It will be much easier to make the case for supporting learning to decision makers and funders if you have carried out a quantifiable cost to benefit analysis

POTENTIAL GAINS MIGHT INCLUDE:

- Reduced turnover and savings on recruitment costs
- Higher skill levels leading to more efficiency and fewer errors
- Reduced risk of accidents or breaches of legislative requirements
- Higher morale and levels of motivation
- Improvements to the quality of your service and reputation
- Sustainability and succession planning

It is worth remembering that investing in training or learning will not always be the appropriate solution for organizational issues. Carrying out a TNA and cost to benefit analysis of implementing the findings is likely to highlight areas where other solutions are required.

Following is a complimentary Position Analysis process so that you can determine that the duties in each position and the skill requirements are consistent with the reasonable expectations a company has of the position.

The Training Needs Assessment Process

1. **Determine the company's benefits of a needs assessment.** This part of the process will sell and help the decision makers and stakeholders understand the concept of the needs assessment. Needs assessment based on the alignment of critical behaviors with a clear mission will account for critical occupational and performance requirements, will eliminate redundant training, will substantially reduce the unnecessary expense of training dollars, and assist managers in identifying performance requirements that can best be satisfied by training and other developmental strategies. To go beyond learning and actually achieve critical behaviors, the company will also need to consider how required behaviors will sustain desired outcomes.

Key steps include:

- Identifying key stakeholders
- Solicit support
- Describe desired outcomes that will contribute to the mission and objectives
- Clarify critical behaviors needed to achieve desired outcomes
- Define required training essential to sustain critical behaviors

2. Plan

- Set goals and objectives for the needs assessment
- Evaluate the organizational readiness and identify key roles
- Evaluate other or prior needs assessments
- Prepare project plan
- Inventory the capacity of staff and technology to conduct a meaningful training skills assessment and analysis
- Clarify success measures and program milestones

3. Conduct Needs Assessment

- Obtain needs assessment data, review strategic plans, assess HR metrics, review job descriptions, conduct surveys, review performance appraisal
- Analyze data
- Define performance problems, issues, occupational groups and individuals
- Describe critical behaviors need to remedy problem and issues
- Determine and clarify why critical behaviors do not currently exist
- Research integrated performance solutions
- If training is the best solution, determine the best training and development approaches
- Assess costs and the benefits of the training and development approaches and build a business case
- Include organizational support mechanisms needed to reinforce the critical behaviors that will positively affect problems and issues
- Describe how the critical behaviors will be monitored and assessed after the implementation of the improvement plan

The result of the TNA allows the training manager or external training consultant to establish the training objectives by answering two very basic questions: what needs to be done, and why is it not being done now. Then, is it more likely that an accurate identification of whom, if anyone, needs training and what training is needed. Sometimes training is not the best solution, and it is virtually never the only solution. Some performance gaps can

be reduced or eliminated through other management solutions, such as communicating expectations, providing a supportive work environment, and checking job fit. These interventions also are needed if training is to result in sustained new behaviors needed to achieve new performance levels, for an individual, an occupation, or an entire organization.



WHY TRAIN?

As never before, your organization's outcomes are more important to your bottom line and now, your very survival. Not to mention the fact that, if you are investing money in labour, you should be netting more return on that expense than the investment; at least 20% more. Many have argued that they simply reduce the labour rates for those who are not contributing as they should be but, what's the point of that; you still are not making the profit you need nor are you capturing market share or perhaps even competing at a survival level. Don't sit back and accept it is a reality – change it!

YOU'RE THE LEADER – YOU'RE RESPONSIBLE FOR THE HEALTH AND FUTURE PERFORMANCE OF THE COMPANY; THAT'S WHAT YOU'RE PAID TO DO. TAKE RESPONSIBILITY FOR YOUR ROLE!

Employee training is one of the first items to get slashed when the operational budget gets squeezed even though trained and energized employees are just what a company needs to stimulate growth and problem-solve in the lean times.

TRAINING IS VITAL BECAUSE...

The innovation, flexibility and dedication that are necessary to build truly dynamic companies come from well-trained and supported employees. One of the best ways to encourage and support individuals in your workplace is through professional development and training opportunities. As employees develop new skills, increase networking, understand organizational interdependencies, and represent the company out in the larger world, and develop leadership skills and marketable skills, the business and work environment becomes infused with energy and creativity.

Sending employees to training opportunities, or bringing opportunities into the company, actually infuses a business with new ideas and creative ways of solving old problems. Sometimes, just getting employees out of the day-to-day grind of their everyday work schedule is enough to jump start energy and encourage employees to recommit to their jobs and the company. But learning new skills, reinforcing the proper way to do their jobs, upgrading current skills and interacting with new and different people has a direct impact on the productivity and development of the work environment.

Trainings need not be expensive or last several days in order to be worthwhile. Workshops, classes and cross-training in other departments within the company can be as invigorating as expensive courses and

conferences. Encouraging employees to learn as much as they can about the company – not just the department where they work – is one way to approach training. Providing individuals about production, finance, quality, purchasing, HR, marketing or other aspects of the business can give them a good overall understanding of how all the pieces work together to contribute to the whole, as well as how their individual job or department fits into the big picture.

Consider implementing or keeping regular training opportunities in place for employees. Training sessions that are once a week, or a month, can be quite productive – giving employees something outside of the ordinary work day to look forward to and encouraging a commitment to professional development and skill growth. While a dedication to keep training opportunities alive and thriving within the company culture can be an expense of time and resources – the benefit in terms of qualified and energetic personnel and bottom-line results is well worth it.

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INTRODUCTION

THE TEMPLATES

These templates were created from Microsoft Word and saved as RTF (Rich Text Format). This allows it to be used by a number of word processors. However, Word would be the best as not all word processors use the same formatting schemes. Also, Microsoft's WordPad, which comes free with Windows, will work to a certain degree; however, a number of formatting errors will occur, such as page numbers being lost and the information in tables not fitting as WordPad has no such features built into it.

Some of the instruments contain two templates: a blank instrument for your use, followed by an example of a completed instrument.

NOTE: Most of the templates contain more information than most users will normally need. Thus the templates were saved in the RTF format to allow them to be edited to suit your needs.

BUSINESS OUTCOME

***“ANALYSIS IS THE STUDY WE DO IN ORDER TO FIGURE OUT WHAT TO DO.” -
ROSSETT, ALLISON & SHELDON, KENDRA (2001). BEYOND THE PODIUM:
DELIVERING TRAINING AND PERFORMANCE TO A DIGITAL WORLD.***

Purpose: Learning initiatives should always be undertaken to improve the performance of the business, thus they should always be defined in business terms. An ROI (Return On Investment) is not always required or cost-effective; however there should be a clear causal link.

For example, frequent feedback to subordinates is normally considered a means for promoting better performance, which should equate to higher profits. Thus “the students will learn feedback skills” is NOT a business outcome as it does not relate to a verifiable outcome.

A better business outcome would be “the learner's subordinates receive more frequent and better feedback” as a result of the learning initiative. The first outcome only told us what will be learned, while this outcome gave us a result that can be measured and verified.

Write your business outcome in terms that show how it will be transferred and then applied in a way that produces results:

SYSTEM OVERVIEW INSTRUMENT

Purpose: To gain an understanding of the system, such as department or process. This will aid the performance process by giving the analysts and developers a background to work from.

1. **Department:**
2. **Date:**
3. **Training Analyst:**
4. **Department Supervisor:**
5. **Summary of Activities:**
6. **Inputs:**
 - A. **People:**
 - B. **Main Material Used:**
 - C. **Main Technologies Used:**
 - D. **Important Time Factors:**
7. **Process:**
8. **Output:**
9. **Problems:**
10. **Background of Proposed Learners:**
 - A. **Average Educational Level:**
 - B. **Average number of years of experience:**
 - C. **Average number of years employed by company:**
 - D. **Required entry level skills and education:**
 - E. **Anticipated number of learners:**
 - F. **Job requirements verses learner's skills:**
 - G. **Language or culture differences of learners:**
 - H. **Motivations of learners:**
 - I. **Physical or mental characteristics of learners:**
 - J. **Specific interests or biases of learners:**

Notes:

SYSTEM OVERVIEW EXAMPLE

Purpose: To gain an understanding of the system, such as department or process. This will aid the performance process by giving the analysts and developers a background to work from.

1. **Department:** Vehicle Maintenance
2. **Date:** February 11, 2012
3. **Training Analyst:** Dorothy Smith
4. **Department Supervisor:** Jim Brown
5. **Summary of Activities:** Performs basic maintenance on the company's vehicles. The maintenance program includes basic tune-ups, changing tires, washing and waxing, diagnostic, replacing parts, oil changes, and lubrication. Fleet includes 76 cars.
6. **Inputs:**
 - A. **Number of People:** 11
 - B. **Main Material Used:** Car parts such as tires, brakes, mufflers, batteries, spark plugs. Oil, and lubricants.
 - C. **Main Technologies Used:** Vehicle diagnostic equipment such as multi-meters and oscilloscopes. Tool sets. Air wrenches.
 - D. **Important Time Factors:** Due to delivery schedules, the daily preventive maintenance checks on 30 delivery vans must be performed in less than 30 min.
7. **Process:** Vehicles have several preventive maintenance checks and services performed on them periodically (daily, monthly, and quarterly). Broken vehicles are repaired as quickly as possible.
8. **Output:** Well-maintained and operational company vehicles.
9. **Problems:** New personnel have to be trained on the main engine diagnostic machine as most only know the basic capabilities while the full range of its capabilities are used in this shop. They also have to be trained on the newly acquired delivery van's brake system.
10. **Background of Proposed Learners:**
 - A. **Average Educational Level:** 14 years (Technical Trade College)
 - B. **Average number of years of experience:** 6
 - C. **Average number of years employed by company:** 5
 - D. **Required entry level skills and education:** Certificate from trade school or 4 years experience
 - E. **Anticipated number of learners:** Seven, plus future new hires
 - F. **Job requirements verses learner's skills:** Replace brakes (antilock system) on delivery vans - new hires are not familiar with this system. Advanced capabilities of the diagnostic machines.
 - G. **Language or culture differences of learners:** 5 of the employees are from a white middle class background (1 female), 5 are Mexican/American (no females), 1 is Black (male). All are fluent in English. All racial groups seem to respect each other.
 - H. **Motivations of learners:** Highly motivated -- they seem to take pleasure in doing quality work. Newly hired personnel seem eager to learn in order to advance.
 - I. **Physical or mental characteristics of learners:** All seem physical fit. No apparent mental handicaps from observations or records.
 - J. **Specific interests or biases of learners:** Like to talk about cars, racing, women, and sports. Although they seem to respect the one female employee, when she is not around, they sometimes make vulgar jokes about females. This could lead to future problems as the company is presently recruiting more females in all company functions.

JOB LIST INSTRUMENT

Purpose: Provides a list of all jobs required for a system, such as department or process. This will aid various Human Resources processes by detailing the staffing requirements.

- 1. Department:
- 2. Date:
- 3. Analyst:
- 4. Department Supervisor:

Job Title	Job Code	Level	Salary Range	# Auth

JOB LIST EXAMPLE

Purpose: Provides a list of all jobs required for a system, such as department or process. This will aid various Human Resources processes by detailing the staffing requirements.

1. **Department:** Human Resources
2. **Date:** February 11, 2012
3. **Analyst:** John Doe, MBA, CHRP
4. **Department Supervisor:** Jane Doe, MSc. Mgmt

Job Title	Job Code	Level	Salary Range	# Auth
Human Resource Director	801		\$65,000 to \$ 75,000	1
Human Resource Information Analyst	805		\$48,000 to \$55,000	1
Labor Relations Representative	809		\$31,000 to \$36,000	1
Employee Training Specialist	815		\$32,000 to \$37,000	3
Compensation Analysis	817		\$35,000 to \$39,000	1
Benefits Planning Analyst	820		\$36,000 to \$44,000	1
Human Resource Generalist	830	2	\$25,000 to 27,000	2
Human Resource Generalist	835	1	\$18,000 to \$23,000	4

JOB DESCRIPTION INSTRUMENT

Purpose: Provides a job description. This will aid various Human Resources processes, such as training or hiring, by detailing the requirements of the job.

- 1. Department:**
- 2. Date:**
- 3. Analyst:**
- 4. Department Supervisor:**
- 5. Job Title:**
- 6. Job Code:**
- 7. Purpose and Description:**
 - A.**
- 8. Supervision required:**
- 9. Number of people supervised:**
- 10. Skills, Education, and Experience required:**
- 11. Special job demands (working conditions, travel, hazards, etc.):**

JOB DESCRIPTION EXAMPLE

Purpose: Provides a job description. This will aid various Human Resources processes, such as training or hiring, by detailing the requirements of the job.

1. **Department:** Sales and Service
2. **Date:** February 11, 2012
3. **Analyst:** Albert Hide
4. **Department Supervisor:** Sam Spade
5. **Job Title:** Customer Service Clerk
6. **Job Code:** 0742
7. **Purpose and Description:**
 - A. Assures that customers receive efficient and courteous service through processing of orders by mail, telephone, or in person.
 - B. Provides pricing and delivery information.
 - C. Receives and answers, customer questions and complaints within established guidelines.
 - D. Acts as liaison between customer and various organization departments.
 - E. Maintains appropriate records and prepares printed reports.
 - F. Operates Computer terminal.
 - G. Performs word processing and related clerical duties.
8. **Supervision required:** Light supervision.
9. **Number of people supervised:** None
10. **Skills, Education, and Experience required:** High School Diploma. Type a minimum of 45 WPM. Prior experience working with a personal computer.
11. **Special job demands (working conditions, travel, hazards, etc.):** Must be able to work in a fast paced environment, be a team player, and maintain good relationships with customers.

TASK INVENTORY INSTRUMENT

Purpose: Provides a list of tasks required by a job. This will aid various Human Resources processes, such as training or setting pay rates, by detailing the tasks to be performed.

1. Department:
2. Date:
3. Analyst:
4. Department Supervisor:
5. Job Title:
6. Job Code:

Task Number	Task

TASK INVENTORY EXAMPLE

Purpose: Provides a list of tasks required by a job. This will aid various Human Resources processes, such as training or setting pay rates, by detailing the tasks to be performed.

1. **Department:** Sales and Service
2. **Date:** February 11, 2012
3. **Analyst:** Jack Sprat
4. **Department Supervisor:** JD
5. **Job Title:** Customer Service Clerk
6. **Job Code:** 0742

Task Number	Task
0742-1	Type orders received by mail, telephone, or in person at a minimum rate of 45 WPM into a computer database under general supervision of the Sales Manager to fill customer orders.
0742-2	Receives and answers customer questions under close supervision of the Service Manager in order to provide good customer relations.
0742-3	Delivers pricing and delivery information received by mail, telephone, or in person under general supervision of the Service Manager to fulfill customer requests.
0742-4	Acts as liaison between customer and various departments under close supervision of the Service Manager in order to provide good customer satisfaction.
0742-5	Post and maintains records in a computer database without supervision to provide the company with historical records for statistical needs.
0742-6	Starts, operates, and shuts down a personal computer without supervision to fulfill various company needs.
0742-7	Performs word processing under general supervision of the Service Manager to provide adequate communications between the Sales and Service department, customers, and other departments.
0742-8	Performs general clerical duties, such as filing, typing, and answering telephones without supervision.
0742-9	Performs computer spreadsheet calculations under general supervision of the Service Manager to for fill the Accounting Department's need for up-to-date charge transactions.
0742-10	Prepares printed reports using a computer spreadsheet or database without supervision to provide the company with adequate information.

TASK SURVEY INSTRUMENT

Purpose: To aid in planning and development training programs for your job.

INSTRUCTIONS

The table below contains a list of tasks relating to your job. Below each task is a section to record:

1. The **frequency** the task is performed - Record it as the approximate number of times that it is performed hourly, daily, weekly, etc. For example: 4 times a day.
2. The **criticality** of each task for the successful performance of the job - There are 4 levels. Circle the one that you believe best describes the task:
1) Not important 2) Somewhat important 3) Important 4) Most important
3. The amount of **training required** to reach proficiency - Enter the number of hours that you believe it would take a new hire to become proficient in the job. It is best to use the total amount of training that you received for you to become proficient.

Job Title:

Name:

Department:

Task Number	Task			
	Frequency	Criticality 1 2 3 4	Training Required	
	Frequency	Criticality 1 2 3 4	Training Required	
	Frequency	Criticality 1 2 3 4	Training Required	
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TASK SURVEY EXAMPLE

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The table below contains a list of tasks relating to your job. Below each task is a section to record:

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2. The **criticality** of each task for the successful performance of the job - There are 4 levels. Circle the one that you believe best describes the task:
1) Not important 2) Somewhat important 3) Important 4) Most important
3. The amount of **training required** to reach proficiency - Enter the number of hours that you believe it would take a new hire to become proficient in the job. It is best to use the total amount of training that you received for you to become proficient.

Job Title: Customer Service Representative

Name: Robert May

Department: Order Entry

Task Number	Task		
0742-1	Type orders received by mail, telephone, or in person at a minimum rate of 45 WPM into a computer database under general supervision of the Sales Manager to fill customer orders.		
	Frequency 6 orders per hour	Criticality 1 2 3 4	Training Required 8 hours
0742-3	Delivers pricing and delivery information received by mail, telephone, or in person under general supervision of the Service Manager to fulfill customer requests.		
	Frequency About 2 per hour	Criticality 1 2 3 4	Training Required 4 hours
0742-5	Post and maintains records in a computer database without supervision to provide the company with historical records for statistical needs.		
	Frequency Daily (end of shift)	Criticality 1 2 3 4	Training Required 2 hours
0742-7	Performs word processing under general supervision of the Service Manager to provide adequate communications between the Sales and Service department, customers, and other departments.		
	Frequency Weekly (as required by supervisor)	Criticality 1 2 3 4	Training Required 3 hours
0742-9	Performs computer spreadsheet calculations under general supervision of the Service Manager to for fill the Accounting Department's need for up-to-date charge transactions.		
	Frequency Daily	Criticality 1 2 3 4	Training Required 2 hours

EMPLOYEE SURVEY

We are looking for ways to improve our training program and would like your feedback on your training requirements.

1. Your Job Title:

2. Type of training received. For each type of training or education listed below, check the box that applies to you.

	Could not have done without it	Of great help	Somewhat helpful	No Help	Did not receive
Formal Schooling					
Apprenticeship					
Employer training program					
On the Job Training					
Help from coworkers					
Instruction Manuals					
Job Aids					

3. What type of training would you recommend to someone starting a job like yours?

4. Would further training help you now? And if so, what kind of training?

5. Do you think this organization offers:

- a) Too much training
- b) A good mix of training
- c) The wrong types of training
- d) Too little training
- e) Too much formal training and not enough on-the-job training
- f) Too much on-the-job training and not enough formal training

6. Any comments on how we could improve the company-training program (use back if needed)?

SUPERVISOR & MANAGER TRAINING SURVEY

We are looking for ways to improve our training program and would like your feedback on your staff training requirements.

1. What type of training do you and your employees require?

2. If you could divide 100 percent of the training effort among the following topics, how would you do so?

- Each column should add up to exactly 100 percent.
- Assign no percentage to topics in which you do not want training.
- For the rows listed as “Other,” enter the type of training that you believe is needed.

	For yourself	For your direct reports	For those who report to your direct reports
1. Leadership			
2. Computers			
3. Time Management			
4. Counseling			
5. Performing Reviews			
6. Writing			
7. Other _____			
8. Other _____			
9. Other _____			
10. Other _____			
TOTAL	100%	100%	100%

3. Do you think this organization offers:

- g) Too much training
- h) A good mix of training
- i) The wrong types of training
- j) Too little training
- k) Too much formal training and not enough on-the-job training
- l) Too much on-the-job training and not enough formal training

4. Any comments on how we could improve the company-training program (use back if needed)?

TASK SELECTION INSTRUMENT

Purpose: To determine if a task should be trained. The first four sections are used to determine if it should be trained. The last two sections will be of aid in selecting the type of training. Depending upon the task, not all questions require an answer.

TASK:

1. REQUIRED BY LAW, SAFETY FACTORS, ORGANIZATIONAL REQUIREMENTS

- Is the training mandated by the Occupational Safety and Health Act?
- Is there a chance that someone may hurt or that damages may occur if it is not trained?
- Is training needed to ensure their behavior does not compromise the company's legal position, i.e., equal employment opportunity, labor relations laws, or state laws?
- Is training required to meet an organizational vision or mission?
- Is the training required to meet company goals or objectives?

Generally, any yes answers in this section requires training or another performance initiative. Analyst's recommendation:

2. USE OF ANOTHER PERFORMANCE INITIATIVE

- Is there another solution, such as a job performance aid or self-study packet?
- Can people be hired that have already been trained?
- To what extent can the task be learned on the job?
- Are the demands (perceptual, cognitive, psychomotor or physical) imposed by the task excessive?
- Are other performance interventions required?
- Is there another creative solution that better meets the organization's needs (brainstorming required to correctly answer this question)?

Another performance solution is generally recommended if it is cheaper or if it better meets the organization needs. Analyst's recommendations:

3. RISKS AND BENEFITS

- What will happen if we do not train this task?
- What are the benefits if we train this task?
- How critical is the task?
- What is the consequence if the task is performed incorrectly?

Identifying the risks and benefits helps in arriving at the correct solution. Analyst's recommendations:

4. TASK COMPLEXITY

- How difficult or complex is the task?
- How often is the task performed during a specified time frame (e.g., daily, weekly, monthly, yearly)?
- How much time is needed to perform this task?
- What behaviors are used in its performance?
- How critical is the task to the performance of the job?
- What information is needed to perform the task? What is the source of information?

Generally, complex and frequently performed tasks require training, while simpler and infrequently performed tasks require other performance solutions (such as job performance aids).

5. COLLECTIVE (TEAM CONSIDERATIONS)

- Does execution of the task require coordination between other personnel or with other tasks?
- If it is one of a set of collective tasks, what is the relationship between the various tasks?

Although identifying the collective degree of the task plays a small amount in deciding if a task should be trained, it is a determining factor in deciding how it will be trained.

6. REQUIREMENTS FOR TRAINING

- What are the performance requirements?
- What prerequisite skills, knowledge, and abilities are required to perform the task?
- What behaviors distinguish good performers from poor performers?
- What level of task proficiency would be expected by the department following training?

This section provides training requirements.

FINAL RECOMMENDATION

Performance Intervention Required:

TASK SELECTION EXAMPLE

Purpose: To determine if a task should be trained. The first four sections are used to determine if it should be trained. The last two sections will be of aid in selecting the type of training. Depending upon the task, not all questions require an answer.

TASK: Move a load with a forklift.

1. REQUIRED BY LAW, SAFETY FACTORS, ORGANIZATIONAL REQUIREMENTS

- **Is the training mandated by the Occupational Safety and Health Act?** Yes
- **Is there a chance that someone may hurt or that damages may occur if it is not trained?** Yes
- **Is training needed to ensure their behavior does not compromise the company's legal position, i.e., equal employment opportunity, labor relations laws, or state laws?** Yes
- **Is training required to meet an organizational vision or mission?** Yes (mission) – Provide a Safe working environment for all personal.
- **Is the training required to meet company goals or objectives?** No

Generally, any yes answers in this section requires training or another performance initiative. **Analyst's recommendation:** Training must be provided.

2. USE OF ANOTHER PERFORMANCE INITIATIVE

- **Is there another solution, such as a job performance aid or self-study packet?** Yes, part of the training will use a self-study packet to reduce classroom-training time.
- **Can people be hired that have already been trained?** Yes, but we try to promote from within and training must be provided by law.
- **To what extent can the task be learned on the job?** Training will only be provided to ensure they know how to operate safely. The rest of the training will be provided on the job.
- **Are the demands (perceptual, cognitive, psychomotor or physical) imposed by the task excessive?** They require good perception (must be able to place loads 40 feet in the air) and they require some manual dexterity to manipulate the controls. Also, they are required to stand for a long period on a moving platform that vibrates quite hard at times (standup forklifts).
- **Are other performance interventions required?** None at this time.
- **Is there another creative solution that better meets the organization's needs (brainstorming required to correctly answer this question)?**

Another performance solution is generally recommended if it is cheaper or if it better meets the organization needs. **Analyst's recommendations:** A self-study packet will be used, followed by a brief class, demonstrations, and then practice and evaluation.

3. RISKS AND BENEFITS

- **What will happen if we do not train this task?** Accidents likely to occur
- **What are the benefits if we train this task?** We will meet OSHA's requirements.
- **How critical is the task?** Very – must be trained to meet distribution requirements.
- **What is the consequence if the task is performed incorrectly?** Accidents likely to occur

Identifying the risks and benefits helps in arriving at the correct solution. **Analyst's recommendations:** Training required

4. TASK COMPLEXITY

- **How difficult or complex is the task?** Moderate
- **How often is the task performed during a specified time frame (e.g., daily, weekly, monthly, yearly)?** Throughout the day.
- **How much time is needed to perform this task?** Normal task completion is about 7 minutes, however it is performed throughout the day on a continuous basis.
- **What behaviors are used in its performance?** Coordinate movement of material with other personal, works without supervision, and perform basic math.
- **How critical is the task to the performance of the job?** Extremely critical.
- **What information is needed to perform the task?** Name of item, quantity, and location. **What is the source of information?** Receiving paperwork, put-away sheets, and letdown sheets.

Generally, complex and frequently performed tasks require training, while simpler and infrequently performed tasks require other performance solutions (such as job performance aids).

5. COLLECTIVE (TEAM CONSIDERATIONS)

- **Does execution of the task require coordination between other personnel or with other tasks?** Must work with receivers and pickers to ensure material is in its designated position at the correct time.
- **If it is one of a set of collective tasks, what is the relationship between the various tasks?**

Although identifying the collective degree of the task plays a small amount in deciding if a task should be trained, it is a determining factor in deciding how it will be trained.

6. REQUIREMENTS FOR TRAINING

- **What are the performance requirements?** Material must be located correctly so that it can be found when needed.
- **What prerequisite skills, knowledge, and abilities are required to perform the task?** Basic math skills, knowledge of warehousing operations, and the ability to operate machinery.
- **What behaviors distinguish good performers from poor performers?** Accuracy and being able to operate safely.
- **What level of task proficiency would be expected by the department following training?** Being able to operate a forklift safely.

This section provides training requirements.

FINAL RECOMMENDATION

Performance Intervention Required: Training. Initial assessment is to provide a blend of self-study, classroom, and hands-on training.

PEOPLE, DATA, THINGS INSTRUMENT

Purpose: To aid in the analysis process by providing the main function of a job.

Background: Tasks are often characterized by the proportions of time spent on people, data, and things. Performance deficiencies are often the result from a mismatch between the nature of a job, and the employee's preference for focus on people, data, or things. Although most jobs entail that the jobholder works with all three functions, there is usually one or two functions that the job extensively focuses upon. Listing all job responsibilities under one of the three categories will provide the information as to what major role an employee will be expected to fulfill -- a people person, a data person, or a thing person.

Instructions: Table 1, shown below, contains a number of verbs to assist you in selecting the correct category:

People	Data	Things
advising	accounting	agility & speed
briefing	analyzing	assembling
communicating	balancing	calibrating
consulting	budgeting	constructing
coaching	collecting	cooking
facilitating	comparing	crafting
following through	compiling	cutting
giving feedback	computing	growing things
guiding discussions	creating	hammering
influencing	designing	hand & eye coordination
initiating	estimating	handling & packaging
instructing	evaluating	inspecting
interviewing	forecasting	maintaining
managing	idea generating	maneuvering
mentoring	imagining	manufacturing
motivating	interviewing	molding
negotiating	organizing	motor skills
persuading	planning	operating
public speaking	problem solving	painting
selling	researching	preparing
sponsoring	retrieving info	repairing
supervising	surveying	sanding
teaching	sorting	setting up
training	synthesizing	uses hands
tutoring	systematizing	weaving

CHART 1

Using chart 1 as a reference, list the various tasks that the jobholder is required to perform in one of the three columns below. Examining the placement of the tasks will assist you in determining the overall type of person required for the job.

People Functions	Data Functions	Thing Functions

Main Job Functions:

TASK PERFORMANCE MEASURE INSTRUMENT

Purpose: Provides task performance standards for human resource functions, such as performance reviews and training requirements.

1. **Task:**
2. **Conditions:**
3. **Behavior:**
4. **Performance Measure:**
5. **Steps:**

TASK PERFORMANCE MEASURE EXAMPLE

Purpose: Provides task performance standards for human resource functions, such as performance reviews and training requirements.

1. **Task:** Enters projected sales into a computer spreadsheet, performs calculations using built in macros, and forwards sales projection report for use in company planning. This is performed without direct supervision
2. **Conditions:** Given a personal computer with spreadsheet application, built in macros, on-line help, projected sales figures, and no supervision.
3. **Behavior:** Produce a projected sales report.
4. **Performance Measure:** Report must provide needed projections and have no math or input errors.
5. **Steps:**
 1. Turn on computer and start spreadsheet application.
 2. Load projected sales report spreadsheet template (prosale.ex1).
 3. Enter projected sales figures into designated spreadsheet cells.
 4. Run spreadsheet macros.
 5. Save file under new name -- pro***.ex1, with *** being the next sequential number, for example pro135.ex1. Note: Do NOT overwrite template.
 6. Forward to Planning Manager by email.
 7. Exit application.

TRAINING ANALYSIS OVERVIEW REPORT

Purpose: Provides an overall view of the analysis phase.

1. **Department:**
2. **Date:**
3. **Analyst:**
4. **Department Supervisor:**
5. **Desired Program:**

GOALS

1. What organizational goal is driving this training?
2. What will the benefit or ROI be?
3. What is the skill gap?
4. What competencies (knowledge, skills, or attitudes) will this program deliver?
5. What factor or evaluation will be used to measure the level of goal achievement?

TARGET POPULATION

1. Who will be trained?
2. What is the estimated class size?
3. How many classes will there be and how long will this training last?
4. What are the knowledge and skill prerequisites?

TYPE OF TRAINING

1. What type of program is being proposed?
2. What media will be employed?

ALTERNATIVES

1. What will happen if we do not delivering the training?
2. What are the restrictions or limitations for delivering a program?
3. What other methods may be used to reach the goal (include limitations and advantages)?

PROJECT PLANNING

1. Estimated timeline:
2. Estimated budgeting:
3. Personal or resources required:

