



Rapid guide

How to Rapidly Identify Training Needs

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In 20 minutes you will:

- Understand how 80/20 (Pareto Analysis) relates to rapid e-learning
- Have a three step model for rapid training needs analysis
- Have a series of checklists and tools to apply that model

Rapid e-learning: a precision weapon

Traditional training delivery (classroom and e-learning) can often have a scattergun approach, attempting to take on a particular topic and cover everything a learner could need to know, so no target, however small, is missed. That approach scores high on completeness, but low on efficiency. Learner time can often be wasted on less important points. The more content added to the course, the more likely the really critical information will get lost in the fog.

Rapid e-learning is more of a surgical strike. It has a small window of opportunity – usually 20 minutes or less. It cannot hope to hit more than one or two key points. Its effectiveness lies in its ability to focus in on a very specific target and deliver with precision.

The value of rapid e-learning relies tremendously on hitting the right target. This Rapid Guide outlines a framework for identifying and prioritising those targets that are right for rapid e-learning in your organisation, using a value-based analysis.

This will get you to the outcome that a more detailed training needs would, but in a fraction of the time. How? By focusing specifically on the greatest points of pain, and the greatest potential to add value..

Identifying those key points means taking an 80/20 approach to needs analysis.

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Rapid angle: 80/20 is key to prioritisation

Pareto analysis, more commonly referred to as 80/20 analysis, states that 80% of results accrue from 20% of inputs for any observed phenomenon. For example, 80% of a firm's sales come from 20% of customers. 80% of performance in an organisation is attributable to 20% of employees. This rule can have great meaning for training prioritisation.

The purpose of training of any kind, in a professional context, is to improve performance. There are many ways and opportunities for individuals to improve their performance: reducing procedural mistakes, identifying new customers, influencing the behaviour of others and many others depending on the topic.

Effective training should focus on providing what's necessary to enable people to improve performance. However, the 80/20 rule suggests that not all performance improvement opportunities merit the same focus.

Rather it suggests that 20% of opportunities, if addressed, will generate 80% of the total potential value of a training solution (assuming the 'perfect' solution will address 100% of opportunities completely). So, focusing training efforts on that top 20% is a far more efficient model than attempting to cover the remaining 80%.

For rapid e-learning with a relatively short duration, having this focus is critical. That is why we recommend a value-driven model for identifying and prioritising opportunities for rapid e-learning to influence performance that will contribute the most to organisational value.

Value-driven model for rapid training needs prioritisation



1. Identify the full range of performance improvement opportunities
2. Establish criteria and rank the opportunities with experts
3. Translate to performance objectives and get approval.

Step 1: Identify the full range of performance improvement opportunities

Our value-driven model for rapid training needs analysis starts with an identification of the full range of opportunities to change and improve performance in a given topic which you can then rank and prioritise.

There are several groups who may potentially assist in generating the range of performance improvement opportunities:

Input	Comment
Stakeholders/sponsors	Business sponsors and stakeholders are likely to have specific views on the desired results, from which you can work backwards to the desired behaviour change
High performers in the target audience	High performers are well placed to explain what they do, how they behave, what mistakes they used to make but have learned to avoid, to take them to the 'top end' of the performance curve that is different from average or lower performers
Line managers of the target audience	The line manager's view of overall performance in a given team or department can be extremely useful in identifying opportunities for potential changes in behaviour to improve performance
Subject Matter Experts	A Subject Matter Expert (assuming that he or she doesn't fall into one of the above categories) will have further views on where performance opportunities exist and may have more objective insight
Existing data sources	Depending on the nature of the topic, there may be existing data which can indicate opportunities to improve performance, for example: <ul style="list-style-type: none">• Volumes and types of customer complaints• Volumes and types of help desk inquiries• Data on reasons for lost sales from CRM system It's sensible to ask the experts (SMEs, line managers, etc.,) for help in interpreting this data if it's available

It's unlikely that you will have the opportunity to access all of the above sources if you are working rapidly. Be guided by your business sponsor on a reasonable subset, ideally including views from at least two different groups from the list above.

Questions to ask:

To keep the information gathering process focused, you should prepare a tightly focused set of questions to elicit potential performance improvement opportunities.

If you can ask just three questions, make them the following:

Category

To identify opportunities to contribute to business goals

To identify opportunities to improve performance

To identify attributes of top performers

Core question

What are the desired business outcomes as a result of any training intervention in this area, e.g. increased revenue from a specific product line, increased retention rates at line manager level, reduced handling cost per customer inquiry?

What are the most common mistakes and opportunities for improved performance people make in this area (including missed opportunities, misperceptions and errors)?

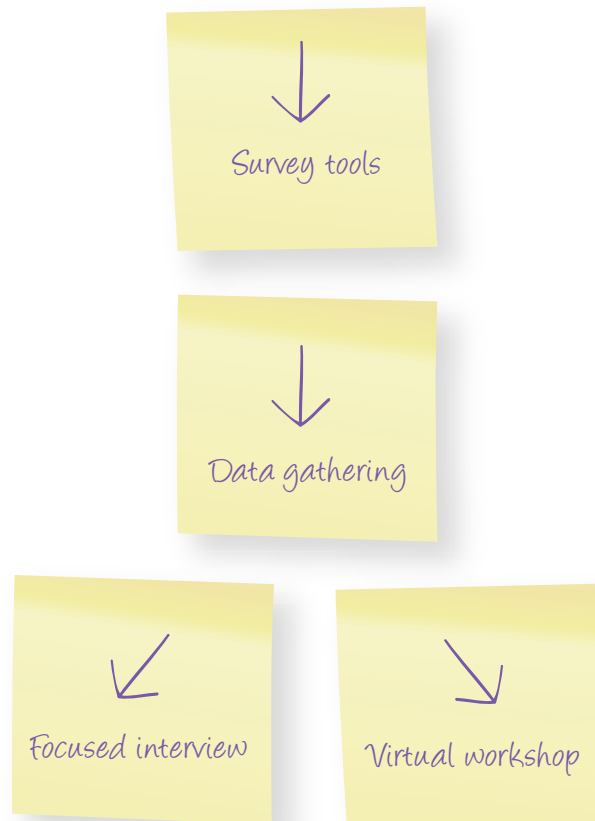
What are the activities, tasks, behaviours that top performers exhibit to set them apart from others in this area?

Hopefully you will have the opportunity to ask more than three questions, but if not, focusing on these three and seeking examples to make each specific and granular, is an excellent base.

At the end of this Guide we include a checklist with these core questions and further questions, organised by interviewee type, to assist in this task.

Methods of gathering data:

Rapid needs analysis requires being flexible in means of gathering this information. As always, be guided by means of communication that is easiest for your target audience.



Consider the following rapid methods for gathering initial information:

Method	Comment
Survey tools	Working with a subject matter expert where possible, develop potential responses for each key question you plan to ask. Use a free survey tool (e.g. Survey Monkey) to create your question set and distribute to a broad cross-section
Focused interviews	Organise a focus group or individual workshops, distributing question sets in advance. Keep sessions to 30 minutes. Look to either focus on specific groups (all line managers, all top performers), or mix roles if time is pressured
Virtual workshop	Use virtual classroom tools if available to run a series of focused workshops, no more than 30 minutes each

The core output of this phase should be a long list of potential actions, behaviours, mistakes, opportunities etc., which if addressed through training, could add some level of value to business performance, through asking the core questions listed above.

Depending on the level of data uncovered in your information gathering process, you may have further information on frequency and potential value of each opportunity. This is a bonus, and assists in prioritisation, but is not essential.

Timing: Depending on how many people are involved in this process, it could be achieved in as little as 30 minutes if one session with core experts can be arranged. However, assume 3-5 sessions will be required, i.e. approx 2-3 hours.

Case study: Performance improvement opportunities for retail

A training project for a US retail company involved gathering data about opportunities to improve performance for a particular section in the store. This was done through a combination of research methods, including mystery shoppers, interviews with experienced employees and managers and interviews with customers.

This yielded the following set of issues, which if corrected would improve performance:

- Expressing personal distaste about products
- Judging by appearance
- Failing to get answer
- Providing incorrect answer
- Ignoring the customer
- Ignoring 2nd customer
- Shifting attention from customers
- Failing to sell the store
- Failing to provide Compare Card
- Failing to cross-sell
- Shifting attention to 2nd customer
- Inadequate probing
- Failing to ask for sale
- Using inappropriate terminology

The effort involved in identifying this set of mistakes was 4-6 weeks across a wide set of markets and geographic regions.

A more rapid approach might have involved no field work or customer interviews, but a set of focused workshops with line managers and top performers. While the data would not have been identical, it's likely to have generated the same core set of opportunities.

Step 2: Establish criteria and rank the opportunities with experts

Having identified a range of opportunities for potential performance improvement for a given area, the next task is to establish priorities. This requires you to:

- Agree criteria for evaluating each opportunity
- Rank each opportunity working with experts.

Establish criteria

This will be influenced in part by data gathered during step 1, particularly based on any direction given by sponsors and stakeholders. Potential criteria for evaluating a performance improvement opportunity are as follows:

Criteria	Comment
Frequency	The more common a mistake occurs, or an opportunity to add value is available, the more valuable it will be to correct it. While precise data may not be available on frequency, a SME should be able to help estimate the relative frequency of one performance improvement opportunity over another
Financial value	If there is data to indicate the financial value of addressing a specific performance improvement opportunity (e.g. increased revenue), or correcting a mistake (e.g. reduced cost), include it in your criteria. As above, if precise data is not available, look to estimate on a relative value. If per instance data is available, you can multiply these two to arrive at a summary score
Cost to address?	While this is not an ROI exercise (see our separate Guide on Rapid approach to return on investment for information on how to do one), it's important to identify whether the potential training solution will require a relatively low, medium or high investment, based on your organisation's metrics. Clearly if the potential cost of addressing a problem is higher than the value that will accrue from addressing it, this should be reason to seriously consider whether to progress with this opportunity - unless there are strong additional reasons (organisational objectives, other non-financial benefits, legislative requirement etc.)

Criteria	Comment
Alignment to objectives	A performance improvement opportunity that has value but is not aligned to business and strategic objectives may not be within the scope of your sponsor's requirements. Be prepared to show how your training is aligned to strategic objectives
Ability for training to address	While we would always hope that training can be part of the answer, it's important to recognise that some issues/ actions may be more related to non-training issues. For example, compensation structures, management style, policy issues. Where an opportunity looks like it may not have a strong training component as part of its solution, rank it lower in this category
Rapid response required	Some performance opportunities may require a more rapid response than others. This may be due to sponsor requirements, competitive pressures, external deadlines. If there are opportunities in your long list that should be prioritised for these reasons, weight them accordingly using this category. Obviously these candidates will be particularly suited to rapid e-learning
Additional factors	<p>There may be other factors that you need to use in your ranking system, based on your environment, e.g.:</p> <ul style="list-style-type: none">• Item is on CEO agenda• Compliance driven requirement• Competitive advantage associated with tasks• Employee opinion survey ranked issue highly <p>If these or other items are not implicit in the categories above, you should add them to your ranking table</p>

We recommend a simple 1-5 scoring for each of these criteria, 1 for a relatively low score compared to other performance improvement opportunities, 5 for relatively high. If there are particular factors that you need to weight, given their importance in your organisation, adjust the scale by applying a weighting factor (e.g. multiply score by 2 for alignment to objectives, etc).

We recommend you take a first cut at the criteria, and communicate them to SME and business sponsor in advance of a live prioritisation task.

Then you should use any additional data gathered in step 1 to assign values to each criteria, e.g. if you have established the relative cost of opportunities, you should complete that ranking category. If this isn't possible, you can agree criteria and rank opportunities in the same session – however you should expect this to add an additional hour to the session depending on the complexity of the content.

Rapid angle : Some hot button issues to avoid

Be careful around issues of attitude, reward, policy and process – these are rarely solvable on their own by a rapid e-learning intervention and you risk focusing your limited design and development resources in the wrong places if you do not return these as a challenge to the business area owner or manager – perhaps in a face to face or conference call with the subject matter expert or business area owner or manager.

Rank each opportunity working with experts:

We recommend focusing this activity with a very small group, ideally a subject matter expert, business sponsor and perhaps one representative of top performers/line managers depending on who was involved in step 1 data gathering.

This will require a live activity, either face to face, conference call or virtual classroom. Facilitate the session by:

- Confirming criteria and proposed weighting
- Presenting each opportunity for performance improvement one at a time
- Asking each person to assign their score
- Where there are broad differences of opinion, ask each person to explain their views
- Taking the average score and assigning it to each category
- Reviewing output based on ranking

At the end of this session you should have a series of total scores for each opportunity to improve performance, with opportunities prioritised according to their value to the organisation.

At this point, you should agree to focus on priorities that add the most value – likely to be the core 20% that yield approximately 80% of the total value score.

Timing: Depending on the number of people involved, expect to take 90 minutes to 2 hours to complete.

Method: Use the Excel spreadsheet delivered with this Rapid Guide to run this activity.

Case study: Opportunity prioritisation

Continuing with the US retail example: the retailer had specific views on the dollar value of, say, a customer leaving the store counter because they were ignored. The frequency of each mistake was determined by extrapolating data across the entire geography. The vendor then made a projection about the extent to which each opportunity could be reduced by a training intervention (ability to reduce).

Improvement opportunity	Value Drivers			Projected Value	
	Frequency	Cost per occurrence	Ability to reduce	Total per year	Percentage
Expressing personal distaste	24,000	\$9	70%	\$151,000	21%
Judging by appearance	20,000	\$8	70%	\$112,000	16%
Failing to get answer	21,000	\$6	70%	\$88,000	12%
Providing correct answer	24,000	\$7	50%	\$84,000	12%
Ignoring the customer	54,000	\$5	20%	\$54,000	8%
Ignoring the 2nd customer	15,000	\$7	40%	\$42,000	6%
Shifting attention from customers	21,000	\$5	35%	\$36,750	5%
Failing to sell the store	9,000	\$5	75%	\$33,750	5%
Failing to provide Compare card	12,000	\$4	60%	\$28,800	4%
Failing to cross-sell	9,000	\$8	40%	\$28,800	4%
Shifting attention to 2nd customer	15,000	\$5	30%	\$22,500	3%
Inadequate probing	9,000	\$11	20%	\$19,800	3%
Failing to ask for sale	3,000	\$10	15%	\$4,500	1%
Using inappropriate terminology	3,000	\$2	30%	\$1,800	0%
Total				\$708,151	100%

When we review this data, it becomes clear that addressing the top three opportunities fully would yield approximately 50% of the potential value of a learning intervention, and correcting the top 5 yields approximately 80% of the potential value. In other words, Pareto (80/20) distribution occurs, which gave a clear mandate to focus on the top five opportunities.

Step 3: Translate to performance objectives and secure sponsor approval

At this point you will should to take the prioritised list of opportunities and create a short (one-page) summary of performance objectives for the rapid e-learning, i.e. how the rapid e-learning will address the agreed priorities. This should form the basis for a project initiation document which project sponsor/stakeholders and the subject matter expert can agree to and approve.

Developing an engaging solution for each individual performance objective should then be the focus of your scoping activities (see our separate Rapid Guide on Scoping rapid e-learning).

As a very rough rule of thumb, your focus should be on addressing one or two performance opportunities for any twenty minute learning component, depending on their complexity. If you find you are taking on too many given the scope of the project, look to revisit the priority list, or separate into sub components within your rapid e-learning.

Timing: You may be able to achieve a rough draft as part of the ranking session. If not, it should not take more than an hour to complete.

Summary Checklists

Print out or use as you complete the process.

1. Question sets:

Business Sponsors/Stakeholders

1. Desired business outcomes as a result of any training intervention in this area?
2. Specific financial targets for each?
3. Actions that a high performing individual could take, to contribute to those desired outcomes?
4. What is the value of each of those actions in terms of its contribution to desired outcomes? Can it be measured financially?
5. Are there departments, units or areas performing to the desired standards already? If so, what differentiates them?

Planned time/date for prioritisation meeting

High performers (including line managers / SMEs)

1. What are the activities, tasks, behaviours that top performers exhibit to set them apart from others in this area?
2. What skills/knowledge have they acquired that enables top level performance in each of those cases?
3. What are the key lessons that a top performer would pass on to someone aspiring to improve in this area?
4. Do we have any data to help quantify the value of those differentiating activities/tasks/behaviours?

Planned time/date for prioritisation meeting

Line managers (potentially including SMEs)

1. What are the most common mistakes people make in this area (including missed opportunities, mis-perceptions and errors)?
2. What are the costs to the organisation of each those mistakes?
3. Do we have any data to help quantify those costs?
4. How frequently do they occur?
5. Which are the ones most critical to address in your opinion?

Planned time/date for prioritisation meeting

2. Opportunities Prioritisation checklist

Please see separate Excel worksheet delivered with this Guide.

Key actions

How to Rapidly Identify Training Needs:

- Ensure that you have identified prioritised needs that rapid e-learning is best placed to address
- Use Pareto analysis (80/20) rule to guide your prioritisation task
- Use the three step approach to conduct rapid training needs analysis
 1. Identify the full range of performance improvement opportunities
 2. Establish criteria and rank accordingly with experts – concentrating your efforts on top 20%
 3. Translate to objectives and seek approval
- Use rapid tools (checklists) and rapid methods (phone, workshops, virtual classroom, surveys) to gather your data.

Take it further

What do you want to do?

Explore the ROI of various options when compared to rapid e-learning

Explore a series of established criteria for high performing learning organisations

Get to grips with the scoping process

Explore ways to measure the results of your rapid e-learning

Check out these Rapid Guides

Rapid E-learning Return on Investment Tool

How to Rapidly Assess Your Learning Function

How to Scope Content for Rapid E-learning

How to Evaluate Rapid E-learning

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