Training Needs Assessment

Complete one assessment per role, team or site. Base gap scores on evidence (QA scores, KPIs, observation, assessments), not on opinion alone. Rate proficiency on a 1 to 4 scale: 1 = cannot do it yet, 2 = does it with help, 3 = does it independently to standard, 4 = can teach it to others.

SCOPE

Business unit / department

Role(s) or team assessed

Site / location

Number of employees in scope

Assessment owner

Business sponsor

Assessment period

Trigger for this assessment

- ☐ Annual planning cycle
- ☐ Performance or quality problem
- ☐ New system, product or process
- ☐ Regulatory or compliance change
- ☐ New hire ramp-up taking too long
- ☐ Restructure or new roles
- ☐ Other

Business problem in one or two sentences (what is not happening that should be?)

EVIDENCE USED

Data sources reviewed

- ☐ Performance reviews
- ☐ QA or audit scores
- ☐ Operational KPIs (AHT, error rate, productivity)
- ☐ Customer complaints or CSAT
- ☐ Skills assessments or tests
- ☐ Manager interviews
- ☐ Employee survey
- ☐ Direct observation
- ☐ Incident or safety reports
- ☐ Exit interview themes

Number of employees surveyed

Number of managers interviewed

Summary of what the data shows

SKILLS GAP GRID (REPEAT ONE ROW PER SKILL)

Skill or task

Required proficiency (1-4)

Current average proficiency (1-4)

Gap (required minus current)

Share of employees below required level (%)

Business impact of the gap

☐ High ☐ Medium ☐ Low

Evidence for this score

ROOT-CAUSE CHECK (ANSWER FOR EACH HIGH-IMPACT GAP)

Do employees know what the standard is?

☐ Yes ☐ No ☐ Unclear

Do they have the tools, systems, time and access to meet it?

☐ Yes ☐ No ☐ Partly

Could they do it if their job depended on it?

☐ Yes (not a training gap) ☐ No (skill or knowledge gap) ☐ Some could

Are incentives, metrics or workload pushing against the standard?

☐ Yes ☐ No ☐ Not sure

Conclusion

☐ Training need ☐ Process, tool or staffing issue ☐ Management or incentive issue

☐ Mix: training plus non-training fix

Non-training actions needed and owner

PRIORITIZED TRAINING NEEDS

Priority rank

Training need

Target audience and headcount

Recommended format

- ☐ Instructor-led classroom
- ☐ Virtual instructor-led
- ☐ E-learning module
- ☐ On-the-job coaching
- ☐ Job aid or quick reference
- ☐ Mentoring
- ☐ External course or certification

Success measure (what metric should move, and by how much)

Target completion date

Estimated cost

Owner

EMPLOYEE SELF-ASSESSMENT QUESTIONS (OPTIONAL SURVEY)

- ☐ Which three tasks in your job take you longest or cause the most rework?
- ☐ Which tasks do you most often ask a colleague or team lead for help with?
- ☐ Rate your confidence on each listed skill from 1 (not confident) to 4 (could teach it).
- ☐ Is there anything you were never formally trained on but are expected to do?
- ☐ What gets in the way of doing your job to standard that is not about skills (tools, time, information)?
- ☐ Which format helps you learn best: hands-on practice, short videos, classroom, or side-by-side coaching?

SIGN-OFF

Prepared by

Date

Business sponsor approval

Date

L&D / HR approval

Date

Review date for re-assessment