



A PROFESSIONAL RESOURCE

Training Needs Analysis **Starter Pack**

Identify Performance Gaps.
Diagnose Training Needs.
Recommend the Right Interventions.

A practical workbook for trainers, HR professionals, L&D teams and training consultants.

INSIDE

Business needs, competency gaps, questionnaires, manager interviews, workplace observation, prioritisation, reporting, action planning and evaluation.

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SECTION

01

Understanding Training Needs Analysis

Learn what a TNA is, why it matters and how to separate requests from verified needs.

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1.1

Welcome to the Training Needs Analysis Starter Pack

Training is most effective when it addresses a genuine performance need.

Yet, in many organisations, training programmes begin with a request rather than an investigation.

A manager reports that employees need better communication skills. A sales head requests negotiation training. A department identifies low productivity and asks for a technical refresher programme.

These requests may be valid. But they are starting points, not conclusions.

Before designing a programme, the organisation needs to understand what is happening, why it is happening, what performance is expected, and whether training can help close the gap.

This is the purpose of Training Needs Analysis.

The Training Needs Analysis Starter Pack is designed to help trainers, HR professionals, Learning and Development teams, consultants and business managers investigate performance needs systematically.

It provides practical tools to:

- Understand business and departmental performance challenges.
- Identify the difference between expected and actual performance.
- Diagnose knowledge, skill and behavioural gaps.
- Gather information from employees, managers and workplace observations.
- Distinguish training needs from non-training issues.
- Prioritise learning interventions according to business impact.
- Document findings and recommend appropriate actions.
- Convert analysis into a practical training plan.

The objective is not to recommend more training.

The objective is to recommend the right intervention for the right performance need.

1.2

What Is Training Needs Analysis?

Training Needs Analysis (TNA) is a structured process used to identify the difference between required performance and actual performance, investigate the causes of that difference, and determine whether learning interventions are necessary.

A comprehensive TNA examines three fundamental questions:

- What performance is required?
- What performance is currently being achieved?
- What is preventing the required performance from being achieved?

The answers help the organisation decide whether to provide training, coaching, improved processes, better tools, clearer expectations, management support or another intervention.

Training Needs Analysis is not simply a survey asking employees which programmes they would like to attend.

Employee preferences are useful inputs, but they must be considered alongside business objectives, performance evidence, competency requirements and workplace conditions.

EXAMPLE

A customer service department receives repeated complaints about delayed responses.

The department head requests customer service training.

A TNA reveals that employees understand the service standards but cannot access updated customer information because the system is slow and departmental approvals are delayed.

In this situation, communication training alone is unlikely to solve the problem.

The organisation may need process redesign, system improvements and clearer decision-making authority. Training may still be useful, but only if a genuine capability gap is also identified.

KEY PRINCIPLE

A performance problem is not automatically a training problem.

1.3

Why Training Needs Analysis Matters

Without proper analysis, organisations risk investing in programmes that are relevant in theory but ineffective in practice.

A systematic TNA helps organisations make better decisions before committing resources.

Business Benefits

- 01 Better alignment with business objectives**
Training recommendations are connected to measurable organisational priorities rather than isolated learning requests.
- 02 More relevant learning experiences**
Programmes focus on the competencies and behaviours participants actually need to improve.
- 03 Better use of training budgets**
Resources are directed towards high-priority needs instead of low-impact or unnecessary programmes.
- 04 Clearer performance expectations**
Employees, managers and trainers develop a shared understanding of the expected standards.
- 05 Stronger managerial involvement**
Managers contribute evidence, define workplace expectations and support the application of learning.
- 06 Improved evaluation**
When the original performance problem is clearly defined, it becomes easier to identify meaningful measures of progress.
- 07 More defensible recommendations**
HR and L&D professionals can explain why a programme is recommended, who needs it, what it should address and how its effectiveness could be assessed.

1.4

The Three Levels of Training Needs Analysis

A complete TNA generally examines organisational, task or role-related, and individual needs.

Level 1: Organisational Analysis

Organisational analysis examines the relationship between business priorities, operating conditions and workforce capability.

It asks:

- What are the organisation's strategic priorities?
- Which business results need improvement?
- What capabilities will be required to achieve future objectives?
- What organisational changes may create new learning needs?
- Which departments or functions are most affected?
- What resources and management support are available?

Example: An organisation is expanding into new markets. Its sales teams may need stronger cross-cultural communication, consultative selling and negotiation capabilities.

Level 2: Task and Role Analysis

Task analysis identifies the knowledge, skills, behaviours and standards required to perform a specific role or task effectively.

It asks:

- What activities must the employee perform?
- What does competent performance look like?
- Which skills and knowledge are essential?
- What errors or performance failures occur most frequently?
- What standards, procedures or regulations must be followed?
- Which tasks are changing or becoming more complex?

Example: A warehouse supervisor must allocate work, monitor inventory accuracy, manage exceptions and coordinate dispatches. Analysis may reveal a gap in inventory reconciliation and exception handling.

Level 3: Individual Analysis

Individual analysis determines whether particular employees or employee groups meet the required performance standards.

It asks:

- What can employees currently do?
- Which competencies are below the required level?
- What evidence supports the identified gap?
- Are the gaps common across a group or limited to individuals?
- What support do employees need to improve?
- Is the gap caused by capability, motivation, resources, process or another factor?

Example: Two employees have missed their sales targets. One needs help with prospect qualification, while the other has a strong conversion rate but an insufficient number of qualified leads. Their needs are different.

Putting the Three Levels Together

Analysis level	Primary focus	Example evidence	Typical output
Organisational	Business priorities and workforce capability	Business plans, KPIs, strategic changes	Organisational capability priorities
Task or role	Requirements of effective performance	Job descriptions, SOPs, observations, error reports	Competency requirements
Individual	Current capability and performance	Assessments, manager feedback, work samples	Individual or group development needs

A reliable TNA connects all three levels instead of treating them as unrelated exercises.

1.5

When Should an Organisation Conduct a TNA?

A TNA is useful whenever there is a meaningful reason to examine workforce capability.

Common triggers include:

- A new business strategy or operating model.
- Introduction of new technology, systems or equipment.
- Persistent performance gaps.
- Changes in job responsibilities.
- New regulatory, safety or compliance requirements.
- Customer complaints or declining service quality.
- High error rates or rework.
- Low productivity or inconsistent work standards.
- Leadership or management capability concerns.
- New employee onboarding requirements.
- Succession planning and talent development.
- Organisational restructuring.
- Preparation for expansion into new markets.
- Poor transfer of learning after previous programmes.
- A planned annual or quarterly learning review.

A TNA can also be conducted proactively when the organisation anticipates future capability requirements rather than waiting for performance to deteriorate.

1.6

Training Request Versus Verified Training Need

One of the most important distinctions in TNA is the difference between a requested programme and a verified learning need.

Training request	Questions to investigate
"Our managers need leadership training."	Which leadership behaviours are below expectation? What evidence demonstrates the gap?
"Salespeople need negotiation skills."	At which stage of negotiation are deals being lost? What do successful salespeople do differently?
"Employees need communication training."	Which communication behaviours create errors, delays or misunderstandings?
"The team needs time management training."	Is the issue prioritisation, workload, unclear ownership, excessive approvals or personal work habits?
"Customer service needs improvement."	Are problems caused by employee capability, service processes, systems, policies or unrealistic service targets?
"We need AI training."	Which business tasks should improve, what tools are authorised, and what capabilities are missing?

The request identifies a concern. The analysis investigates its causes.

Practical Exercise: Examine a Training Request

Training request received:

"Our department needs a two-day communication skills programme because employees are not communicating properly."

Complete the following before recommending a programme.

1 What specific problem has been observed?

2 Who is affected by the problem?

3 What should employees be doing differently?

4 What evidence confirms the performance gap?

5 What might be causing the problem?

6 What information is still required?

7 What would justify a training intervention?

SECTION

02

The Training Needs Analysis Process

Follow seven steps from the business need to evidence-based recommendations.

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2.1

The Complete TNA Workflow

Training Needs Analysis should follow a logical sequence so that conclusions are based on evidence rather than assumptions.

01

DEFINE THE BUSINESS NEED

Clarify the problem, desired result and business context.

02

DEFINE REQUIRED PERFORMANCE

Establish expected standards, tasks and competencies.

03

COLLECT PERFORMANCE EVIDENCE

Review data, interview stakeholders, survey employees and observe work.

04

IDENTIFY THE GAP

Compare actual performance with the required standard.

05

DIAGNOSE THE CAUSE

Investigate capability, motivation, process, tools and management factors.

06

PRIORITISE AND RECOMMEND

Select proportionate interventions based on evidence, risk and impact.

07

PLAN, IMPLEMENT AND REVIEW

Document actions, ownership, success measures and follow-up.

2.2

Step 1: Define the Business Need

Begin by understanding the business issue that triggered the analysis.

Do not start by selecting a course title.

Start by clarifying the outcome the organisation needs.

Examples include:

- Reduce order-processing errors.
- Improve customer retention.
- Increase sales conversion.
- Reduce workplace incidents.
- Improve first-time manager effectiveness.
- Shorten service response times.
- Improve compliance with operating procedures.
- Increase the accuracy of inventory records.

A useful business problem statement identifies the current situation, the desired situation and the consequences of the gap.

Business Need Definition Worksheet

Department or business unit:

Business problem or opportunity:

Current performance:

Desired performance:

Evidence supporting the concern:

Business impact of the gap:

Who is affected?

Why must this issue be addressed now?

What would successful improvement look like?

Initial stakeholder request:

Information still required:

2.3

Step 2: Define Required Performance

Before assessing a gap, define what satisfactory performance means.

Vague standards such as "good communication," "strong leadership" or "better customer service" are difficult to assess consistently.

Translate broad expectations into observable actions and measurable standards wherever practical.

Vague expectation	More observable performance expectation
Communicate effectively	Confirm instructions, summarise decisions and document agreed actions
Demonstrate leadership	Set priorities, delegate responsibilities and provide timely feedback
Improve customer service	Acknowledge requests within the agreed service standard and resolve eligible issues accurately
Manage time better	Prioritise work against deadlines and communicate risks before commitments are missed
Improve sales skills	Qualify opportunities, identify customer needs and agree on appropriate next steps
Follow procedures	Complete required checks in the specified sequence and record exceptions accurately

Required Performance Worksheet

Role or employee group:	
Task or responsibility:	
Expected result:	
Required knowledge:	
Required skills:	
Required behaviours:	
Applicable standard, procedure or policy:	
How will competent performance be observed or measured?	
Who confirms the required standard?	

2.4

Step 3: Collect Performance Evidence

A TNA becomes more reliable when it draws on multiple sources of information.

No single method is appropriate for every situation. Choose methods based on the question being investigated, the quality of available evidence and the people affected.

Common Evidence Sources

Business performance data

Examples include productivity, sales conversion, customer satisfaction, error rates, quality measures, safety incidents and service-level performance.

Existing organisational documents

Examples include job descriptions, competency frameworks, standard operating procedures, performance standards, audit findings and previous evaluation reports.

Employee surveys

Useful for gathering information from larger groups about confidence, perceived capability, obstacles and learning needs.

Manager interviews

Useful for understanding performance expectations, observed behaviours, business priorities and the practical consequences of capability gaps.

Employee interviews

Useful for exploring work challenges, task requirements, confidence, previous learning and support needs.

Workplace observation

Useful for identifying how tasks are performed, where errors occur and whether actual working conditions support effective performance.

Knowledge and skills assessments

Useful for testing specific capabilities against defined standards.

Work samples and quality reviews

Useful for examining actual outputs, such as customer communications, completed transactions, reports, presentations or operational records.

Customer and stakeholder feedback

Useful when the performance issue affects service, communication, responsiveness or the quality of work delivered to others.

Evidence Collection Worksheet

Evidence source	Information required	Person responsible	Status	
Business performance data			☐ Pending	☐ Complete
Employee feedback			☐ Pending	☐ Complete
Manager interviews			☐ Pending	☐ Complete
Workplace observation			☐ Pending	☐ Complete
Skills assessment			☐ Pending	☐ Complete
Existing documents			☐ Pending	☐ Complete
Other source			☐ Pending	☐ Complete

Evidence Quality Check

Before relying on evidence, ask:

- Is the information relevant to the performance problem?
- Is it recent enough for the decision being made?
- Does it represent the employees or work being assessed?
- Is the measure defined consistently?
- Could other factors explain the result?
- Does the evidence show a pattern or only an isolated event?
- Can the findings be corroborated by another source?
- Are confidentiality and access requirements being respected?

NOTE

Document limitations rather than presenting uncertain conclusions as established facts.

2.5

Step 4: Identify the Performance Gap

A performance gap is the difference between required performance and actual performance.

It can relate to results, task execution, knowledge, skills, behaviours or compliance with a defined standard.

Basic Performance Gap Formula

$$\text{Performance Gap} = \text{Required Performance} - \text{Actual Performance}$$

The formula provides a simple conceptual comparison. For qualitative competencies, use a defined rating scale or behavioural description instead of subtracting arbitrary ratings.

Example 1: Quantitative Performance Gap

Required monthly output: 1,000 completed transactions.

Actual monthly output: 820 completed transactions.

$$1,000 - 820 = 180$$

The current output is 180 transactions below the required target.

This identifies the size of the gap. It does not explain its cause.

Example 2: Quality Gap

Required standard: At least 98% accuracy.

Actual accuracy: 92%.

$$98\% - 92\% = 6 \text{ percentage points}$$

The accuracy gap is six percentage points.

Further investigation is needed to establish whether the cause involves knowledge, task complexity, system design, workload, unclear instructions or other factors.

Example 3: Behavioural Gap

Required behaviour: Managers provide specific, timely and actionable performance feedback.

Observed behaviour: Managers provide feedback inconsistently, and many conversations focus on general impressions rather than observable examples.

The gap can be documented through behavioural indicators, structured observations, employee feedback and manager interviews.

Performance Gap Analysis Worksheet

Performance area	Required standard	Actual performance	Gap or difference	Evidence
Area 1				
Area 2				
Area 3				
Area 4				

Which gaps have the greatest business consequences?

Which gaps appear common across the group?

Which gaps appear specific to individuals or roles?

Which findings require additional verification?

2.6

Step 5: Diagnose the Root Cause

Identifying a gap is not the same as identifying its cause.

A TNA should examine why performance is below expectation before deciding on a solution.

Training is appropriate when a relevant knowledge, skill or capability gap exists and learning can reasonably help close it.

Other causes may require different interventions.

Common Causes of Performance Gaps

Potential cause	Typical indicators	Possible response
Knowledge gap	Employee does not understand a concept, policy or procedure	Structured learning, guidance or reference material
Skill gap	Employee understands the task but cannot perform it to the required standard	Practice, demonstration, coaching and feedback
Behavioural capability gap	Employee struggles to apply appropriate behaviours in work situations	Behavioural practice, feedback and workplace reinforcement
Unclear expectations	Employees interpret responsibilities or standards differently	Clarify roles, targets and performance standards
Process problem	Steps are duplicated, delayed or unnecessarily complex	Review and redesign the process
Inadequate tools or technology	Employees cannot complete tasks effectively with available systems	Improve systems, access, equipment or technical support
Workload or capacity issue	Work demand exceeds available time or resources	Review staffing, workload and resource allocation
Motivation or consequences	Desired behaviours are not reinforced or accountability is inconsistent	Review incentives, recognition, consequences and management practices
Limited manager support	Employees lack feedback, direction or opportunities to apply skills	Manager coaching, accountability and structured follow-up
Poor information access	Employees cannot obtain accurate or current information	Improve documentation, communication and information access
Competing priorities	Employees are expected to meet conflicting goals	Align priorities, responsibilities and performance measures

These categories are diagnostic prompts, not automatic conclusions. Several causes may operate together.

The Five Whys Worksheet

The Five Whys technique explores a problem by repeatedly asking why it occurs. Five is a guide rather than a fixed requirement.

Problem statement:

Why 1: Why does this problem occur?

Why 2: Why does that happen?

Why 3: Why does that happen?

Why 4: Why does that happen?

Why 5: Why does that happen?

Potential underlying cause:

Evidence supporting this explanation:

Other possible explanations:

What must be verified before recommending action?

Root Cause Verification

Before accepting a suspected cause, ask:

- What evidence supports the explanation?
- Can the explanation account for the observed performance pattern?
- Does the problem occur when employees have the required knowledge and resources?
- Are high performers experiencing the same obstacles?
- Could process, technology, workload or management factors explain the gap?
- What additional observation or test could confirm the cause?

NOTE

Do not treat a plausible explanation as a verified root cause until sufficient evidence supports it.

2.7

Step 6: Prioritise the Identified Needs

Not every performance gap deserves immediate intervention.

Prioritisation helps organisations focus on needs with the greatest business impact, urgency, risk and potential for improvement.

Consider:

- Business impact.
- Regulatory, safety or operational risk.
- Size and persistence of the gap.
- Number of employees affected.
- Strategic importance.
- Cost of leaving the problem unresolved.
- Feasibility of addressing the issue.
- Availability of evidence.
- Readiness of managers and employees to support change.

Suggested Priority Categories

Priority 1: Critical

Issues involving significant safety, compliance, customer, financial or operational risk, or an urgent strategic requirement. Escalation or immediate corrective action may be necessary.

Priority 2: High

Performance gaps with substantial business consequences that should be addressed within a defined planning period.

Priority 3: Moderate

Meaningful capability gaps that affect effectiveness but do not present the same level of urgency or risk.

Priority 4: Developmental

Longer-term development needs that support career growth, future capability or general professional effectiveness.

Priority labels should be defined according to the organisation's context. A serious compliance or safety concern may require immediate controls before any training programme can be developed.

Training Needs Priority Matrix

Rate each need using a consistent scale.

Criterion	Rating guidance
Business impact	1 = Low, 5 = Very high
Urgency	1 = Can wait, 5 = Immediate
Risk if unresolved	1 = Low, 5 = Very high
Number of people affected	1 = Few, 5 = Many
Evidence confidence	1 = Weak, 5 = Strong

Use these ratings to support discussion, not to replace professional judgement. Evidence confidence should influence how firmly a recommendation is made.

Priority Scoring Worksheet

For a simple initial ranking, add the ratings for business impact, urgency, risk and number of people affected.

$$\text{Priority Score} = I + U + R + N$$

Where:

- I = Business impact
- U = Urgency
- R = Risk if unresolved
- N = Number of people affected

The possible score ranges from 4 to 20. Higher scores indicate greater apparent priority.

NOTE
This is an illustrative screening tool, not a validated risk model. Apply mandatory safety, legal and compliance requirements separately, and do not let a low numerical score override them.

Identified need	Impact	Urgency	Risk	People affected	Total	Proposed priority
Need 1						
Need 2						
Need 3						
Need 4						
Need 5						

Which needs require immediate action?

Which needs can be combined into a common learning intervention?

Which needs require a non-training solution first?

Which needs require more evidence before a decision?

2.8

Step 7: Convert Findings into Recommendations

The final purpose of TNA is to inform decisions and action.

Recommendations should identify the performance gap, supporting evidence, diagnosed causes, appropriate intervention, ownership and success measures.

Avoid recommendations that simply list course titles.

Weak Recommendation

WEAK

"Conduct communication training for all employees."

Stronger Recommendation

STRONGER

"Conduct a targeted communication programme for customer-facing employees who demonstrate difficulty in clarifying customer requirements and confirming agreed next steps. Use customer interaction reviews and manager observations to identify participants. Practise clarification, summarising and confirmation techniques through realistic scenarios. Managers will review selected interactions after the programme to assess workplace application."

The stronger recommendation explains the audience, the capability, the learning approach and the follow-up.

TNA Recommendation Worksheet

Identified performance gap:	
Supporting evidence:	
Likely or verified cause:	
Recommended intervention:	
Target audience:	
Required capability or behaviour:	
Delivery approach:	
Manager or workplace support required:	
Proposed success measures:	
Responsible owner:	
Target completion date:	
Risks or dependencies:	

SECTION

03

Business Needs Analysis

Connect performance problems to business priorities, measures and stakeholders.

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3.1

Purpose of Business Needs Analysis

Business Needs Analysis establishes why a capability intervention may be necessary and how it connects to organisational performance.

It helps prevent training from becoming disconnected from business priorities.

A useful analysis begins with the business result and works backwards to the activities, roles and capabilities that contribute to it.

For example:

Business result: Improve customer retention.

Relevant operational measures: Complaint resolution, repeat purchases, customer satisfaction and renewal rates.

Relevant work activities: Diagnose customer concerns, resolve issues, communicate options and follow up on commitments.

Potential capability requirements: Listening, problem-solving, product knowledge, negotiation and service recovery.

Possible interventions: Training, coaching, process improvements, updated guidance, improved decision authority or technology changes.

This chain must be verified. A relationship between training and a business result should not be assumed merely because the topics appear related.

3.2

Business Context Review

Use this worksheet to understand the environment in which the performance issue occurs.

Organisation or business unit:

Strategic priority:

Current business challenge:

Expected business outcome:

Timeframe for improvement:	
Departments or functions affected:	
Roles involved:	
Customers or stakeholders affected:	
Current operating conditions:	
Relevant organisational changes:	
Known constraints:	
Related initiatives already underway:	
Business owner responsible for the outcome:	

3.3

Business Performance Indicator Review

Identify the measures that help explain the problem.

Performance indicator	Current result	Target or benchmark	Gap	Data source
Productivity				
Quality or accuracy				
Customer satisfaction				
Sales or conversion				
Service response				
Compliance or safety				
Other				

Not every measure will be relevant to every analysis. Select indicators that meaningfully relate to the business problem.

Record the measurement period, definitions and any limitations. A target and an actual result must be measured on a comparable basis before the difference is interpreted.

3.4

Stakeholder Mapping

Different stakeholders see different parts of a performance problem.

A TNA should identify whose input is necessary and what each person can contribute.

Stakeholder	Contribution	Questions to explore
Business leader	Strategic direction and business impact	What result must improve, and why?
Department head	Functional performance requirements	Where is performance below expectation?
Line manager	Direct observation of employee performance	Which behaviours or tasks need improvement?
Employees	Experience of the work and its barriers	What makes effective performance difficult?
HR or L&D	Capability frameworks and learning options	What learning support may be appropriate?
Process owner	Workflow and procedural requirements	Are the process and responsibilities effective?
IT or technical support	System and technology conditions	Are tools, access and system performance adequate?
Quality, risk or compliance team	Standards, controls and risk evidence	Which requirements are mandatory?
Customers or internal users	Experience of service and work outputs	Where are service expectations not being met?

Stakeholder Interview Planning Sheet

Stakeholder name or role:	
Reason for consultation:	
Information required:	
Questions to ask:	
Evidence or documents to request:	
Interview date:	
Key findings:	
Follow-up required:	

3.5

Business Outcome Mapping

Complete the following chain to connect a business priority to potential learning requirements.

Business objective:	
Desired business result:	
Operational measure affected:	
Critical work activities:	

Roles responsible for those activities:

Required performance standards:

Observed performance gaps:

Potential causes:

Potential capability requirements:

Recommended interventions:

How will improvement be measured?

3.6

Business Needs Analysis Summary

Summarise the analysis before moving into competency assessment.

1 What business result needs improvement?

2 What evidence demonstrates the need?

3 Which work activities influence the result?

4 Which roles or groups are most affected?

5 What capability requirements may be relevant?

6 What non-training factors must be addressed?

7 What further evidence is required?

8 What should the organisation investigate next?

SECTION

04

Competency Gap Analysis

Compare required and current capability using clear, observable standards.

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Competency Development Planning	p. 45

4.1

Understanding Competency Gaps

A competency gap exists when an employee's demonstrated knowledge, skills or behaviours do not meet the requirements of a role or task.

Competency analysis provides a structured way to compare required capability with current capability.

Competencies may include:

Knowledge: Understanding principles, policies, procedures, products, systems or technical concepts.

Skills: The ability to perform activities such as analysis, presentation, negotiation, problem-solving or equipment operation.

Behaviours: Observable actions such as active listening, accountability, collaboration, feedback, decision-making and adherence to standards.

Application: The ability to use knowledge and skills effectively in real work situations.

A competency framework should describe observable expectations. Labels alone are not sufficient for a reliable assessment.

4.2

Building a Competency Framework

For each role, identify the competencies that materially affect effective performance.

A practical competency framework should include:

- Competency name.
- Definition.
- Required proficiency level.
- Observable behavioural indicators.
- Evidence sources.
- Assessment method.
- Development options.

Example: First-Time Manager Competency Framework

Competency	Expected performance indicators
Goal setting	Converts team objectives into clear priorities and individual responsibilities
Delegation	Assigns outcomes, authority and deadlines appropriate to the task
Communication	Explains expectations, confirms understanding and shares relevant information
Feedback	Provides timely, specific and actionable feedback
Coaching	Uses questions and guidance to help employees develop capability
Performance management	Monitors results and addresses performance concerns consistently
Conflict management	Identifies issues early and facilitates constructive discussion
Decision-making	Uses relevant evidence, considers risks and explains decisions
Team development	Identifies development needs and creates opportunities to practise
Accountability	Follows through on commitments and applies agreed standards fairly

This example can be adapted to the organisation's managerial responsibilities and standards.

4.3

Competency Proficiency Rating Scale

Use a defined rating scale to assess current and required capability.

Rating	Level	Description
1	Foundational	Understands basic concepts but requires substantial guidance to perform the task
2	Developing	Performs routine elements with support; consistency remains limited
3	Competent	Performs the task independently to the expected standard in normal situations
4	Advanced	Handles complex situations effectively and adapts methods when needed
5	Expert	Demonstrates extensive mastery and can guide others or establish effective practice

These descriptions are illustrative. Adapt them to the role and competency being assessed. Not every role requires Level 5 proficiency.

Provide evidence for ratings wherever possible. A self-rating can indicate confidence or perceived capability, but it should not automatically be treated as proof of demonstrated competence.

4.4

Competency Gap Calculation

For competencies rated on the same ordinal scale, a simple difference can help identify development priorities:

$$\text{Rating Gap} = \text{Required Level} - \text{Current Level}$$

For example:

Required level = 4

Current level = 2

Rating gap = 2 levels.

This difference is a prioritisation aid, not a precise measure of capability or the amount of training required.

A zero gap means the assessed rating matches the required level. A negative gap means the recorded current rating exceeds the specified requirement, subject to the reliability of the assessment.

4.5

Competency Gap Assessment Template

Department:	
Role or job family:	
Employee group:	
Assessment period:	

Competency	Required level	Current level	Gap	Evidence or observation
Competency 1				
Competency 2				
Competency 3				
Competency 4				
Competency 5				
Competency 6				
Competency 7				
Competency 8				
Competency 9				
Competency 10				

Most significant competency gaps:

- 1
- 2
- 3

Competencies meeting the required standard:

Ratings requiring further verification:

Recommended assessment or development actions:

4.6

Individual Competency Assessment

Use this worksheet when a more detailed assessment of one employee is required.

Employee identifier or role:

Role requirements:

Competency being assessed:

Required proficiency level:

Observed current proficiency:

Assessment method used:

- ☐ Structured observation
 ☐ Work sample
 ☐ Knowledge assessment
 ☐ Practical demonstration
☐ Manager assessment
 ☐ Employee self-assessment
 ☐ Customer or stakeholder feedback
☐ Other:

Evidence supporting the assessment:

Situations in which the gap is most apparent:

Factors that may affect performance:

Development action required:

Support needed from the manager:

Review date:

4.7

Group Competency Gap Analysis

When assessing a team or department, distinguish common capability gaps from isolated needs.

A group analysis can reveal whether a shared programme is appropriate or whether different employees require different levels of support.

Competency	Employees assessed	Employees below standard	Percentage below standard	Proposed response
Competency 1			%	
Competency 2			%	
Competency 3			%	
Competency 4			%	
Competency 5			%	

Calculate the percentage below standard using a consistent denominator:

$$\text{Percentage Below Standard} = (\text{Employees Below Standard} \div \text{Employees Assessed}) \times 100$$

For example, if 12 of 30 assessed employees fall below the defined standard, the percentage below standard is 40%.

Record the number assessed and any sampling limitations. Do not assume that the result represents a wider population when the sample is incomplete or unrepresentative.

4.8

Competency Development Planning

For each significant gap, define how the employee will move towards the required level.

Competency:	
Current proficiency:	
Target proficiency:	
Specific behaviour or skill to improve:	
Recommended learning or development method:	
Practice opportunity:	
Manager support:	
Evidence of improvement:	
Target review date:	
Outcome of review:	

SECTION

05

Employee Training Needs Analysis Questionnaire

Gather employee views on capability, confidence, barriers and development priorities.

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Section B: Capability and Confidence	p. 49
Section C: Work Challenges and Barriers	p. 50
Section D: Previous Learning and Development	p. 51
Section E: Future Capability Requirements	p. 52
Section F: Development Priorities	p. 53
Employee Questionnaire Analysis Sheet	p. 54

5.1

Purpose of the Questionnaire

An employee TNA questionnaire gathers information about perceived capability, work challenges, confidence and development priorities.

It can help identify patterns across a group and inform further investigation.

However, employee self-reports should not be used as the sole basis for important decisions. Perceived confidence may differ from demonstrated competence, and employees may not always know which capabilities are most important to future business performance.

Use the questionnaire alongside performance evidence, role requirements and manager input.

5.2

Questionnaire Administration Guidelines

Before distributing the questionnaire:

- Explain why the information is being collected.
- Clarify how the findings will be used.
- Identify whether responses will be anonymous, confidential or attributable.
- Avoid collecting personal information that is not necessary.
- Use questions that relate to actual job responsibilities.
- Provide a realistic completion timeframe.
- Ensure employees have a way to ask questions.
- Communicate what will happen after the analysis.
- Use accessible language.
- Avoid promising anonymity if the data collection method does not support it.

The questionnaire should support diagnosis and development, not create the impression that employees are being judged solely on their responses.

5.3

Employee Information

Questionnaire title: Employee Training Needs Analysis

Purpose: To understand current capability, work-related challenges and potential development requirements.

Department or function:

Role or job family:

Length of time in current role:

☐ Less than 6 months ☐ 6–12 months ☐ 1–3 years ☐ More than 3 years

Primary responsibilities:

Optional employee identifier, if required by the assessment design:

5.4

Section A: Role and Performance Understanding

1 How clearly do you understand the performance expectations of your role?

☐ Very clearly ☐ Mostly clearly ☐ Partly clearly ☐ Not clearly

2 How clearly do you understand the standards used to assess your work?

☐ Very clearly ☐ Mostly clearly ☐ Partly clearly ☐ Not clearly

3 Which responsibilities are most important to your role?

4 Which responsibilities do you find most challenging?

5 Are there tasks for which you need clearer instructions or guidance?

☐ Yes

☐ No

☐ Unsure

If yes, describe the task or situation.

5.5

Section B: Capability and Confidence

Use the following scale for Questions 6–13:

1 = Not confident 2 = Slightly confident 3 = Moderately confident 4 = Very confident 5 = Highly confident

Rate your current confidence in the following areas.

Capability	Rating from 1–5
Understanding relevant policies and procedures	
Using required systems and tools	
Performing core job tasks	
Solving routine work problems	
Communicating with colleagues and stakeholders	
Managing workload and priorities	
Handling unexpected situations	
Applying feedback to improve performance	

14 Which three work-related capabilities would you most like to improve?

1

2

3

15 What tasks would you like more practice in?

16 Are there responsibilities you avoid or find difficult because you feel insufficiently prepared?

☐ Yes ☐ No ☐ Prefer to discuss privately

If appropriate, describe the responsibilities.

5.6

Section C: Work Challenges and Barriers

17 What most frequently prevents you from performing your work as effectively as you would like?

Select all that apply.

- ☐ Lack of knowledge or information ☐ Limited practical skills
☐ Unclear instructions or expectations ☐ Outdated or complicated procedures
☐ Inadequate tools, systems or equipment ☐ Excessive workload ☐ Insufficient time
☐ Limited access to guidance ☐ Delays in approvals or decisions ☐ Limited opportunity to practise
☐ Conflicting priorities ☐ Other:

18 Which tasks generate the most errors, rework or delays?

19 What additional information, tools or support would help you perform better?

20 How often do you receive useful feedback about your work?

- ☐ Very frequently ☐ Frequently ☐ Sometimes ☐ Rarely ☐ Never

21 How available is support when you encounter a difficult work situation?

- ☐ Always available ☐ Usually available ☐ Sometimes available ☐ Rarely available
☐ Not available

22 What changes to the work environment or process would help improve performance?

5.7

Section D: Previous Learning and Development

23 Have you attended training relevant to your current role during the past 12 months?

- ☐ Yes ☐ No

If yes, identify the programme or topic.

24 How useful was the training for your actual work?

- ☐ Extremely useful ☐ Very useful ☐ Moderately useful ☐ Slightly useful ☐ Not useful
☐ Not applicable

25 Have you had opportunities to apply what you learned?

- ☐ Frequently ☐ Sometimes ☐ Rarely ☐ Never ☐ Not applicable

26 What helped you apply previous learning?

27 What prevented you from applying previous learning?

- 28 What type of development support would help you most?
- ☐ Instructor-led training ☐ Virtual instructor-led training ☐ Self-paced digital learning
- ☐ Practical workshops ☐ Coaching ☐ Mentoring ☐ Job shadowing ☐ On-the-job practice
- ☐ Reference guides or job aids ☐ Peer learning ☐ Other:

5.8

Section E: Future Capability Requirements

- 29 Are there upcoming changes to your role that may require new capabilities?
- ☐ Yes ☐ No ☐ Unsure
- If yes, describe the expected changes.
- 30 Which new responsibilities or technologies may affect your work?
-
- 31 What skills or knowledge will be important for your role over the next 12 months?
-
- 32 What would help you prepare for these requirements?
-

5.9

Section F: Development Priorities

33 Identify up to three development priorities.

Priority	Capability or topic	Why it matters to your work
1		
2		
3		

34 What specific improvement would you like to see in your work after development?

35 How would you and your manager recognise that improvement?

36 Is there anything else that should be considered when planning your development?

5.10

Employee Questionnaire Analysis Sheet

After collecting responses, summarise the patterns rather than simply counting programme requests.

Number of employees invited:	
Number of responses received:	
Response rate:	
Departments or roles represented:	
Most frequently identified capability needs:	

1	
2	
3	
4	
5	

Most frequently identified workplace barriers:

--

1	
2	
3	

Capabilities with the lowest confidence ratings:

Training requests requiring further validation:

Non-training issues requiring investigation:

Groups requiring separate analysis:

Recommended next steps:

Questionnaire Interpretation Notes

When reviewing the results:

- Compare responses across relevant roles or departments.
- Look for patterns rather than treating every individual preference as an organisational priority.
- Distinguish low confidence from demonstrated performance gaps.
- Investigate differences between employee and manager perceptions.
- Consider whether the questionnaire reached the intended population.
- Avoid treating missing responses as evidence that no need exists.
- Validate high-priority findings using other evidence sources.
- Protect employee confidentiality and report group findings responsibly.

SECTION

06

Manager Interview Guide

Investigate expectations, barriers and workplace support through structured questions.

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Interview Questions: Employee Performance	p. 59
Interview Questions: Capability Requirements	p. 60
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Interview Questions: Learning and Workplace Support	p. 62
Interview Questions: Priorities and Success Measures	p. 63
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Interviewer Reflection	p. 65

6.1

Purpose of Manager Interviews

Managers can provide valuable information about expected performance, observed capability, operational barriers and business priorities.

A structured interview helps ensure that different managers are asked comparable questions and that findings can be analysed consistently.

The interview should investigate the work and the evidence rather than simply ask managers which training programmes they want.

6.2

Interview Preparation

Department or business unit:	
Manager role:	
Interviewer:	
Interview date:	
Business issue being investigated:	
Relevant performance data reviewed:	
Documents required:	
Estimated interview duration:	

6.3

Opening Script

Use or adapt the following introduction.

"The purpose of this discussion is to understand the performance requirements of your team, identify any gaps between expected and actual performance, and investigate the factors contributing to those gaps.

The objective is not to assume that training is required. We want to understand what is happening, what evidence is available and what interventions are most likely to improve performance.

Your input will help us identify the appropriate next steps. Findings will be documented and used in accordance with the agreed confidentiality and reporting arrangements."

6.4

Interview Questions: Business Priorities

- 1 What are the most important business objectives for your department over the next 6–12 months?

- 2 Which performance measures matter most to your team?

- 3 Where is current performance below the required standard?

- 4 What are the operational or business consequences of the gap?

- 5 Are there upcoming changes that will create new capability requirements?

6.5

Interview Questions: Employee Performance

- 6 Which tasks or responsibilities are employees finding most difficult?

- 7 What do high-performing employees do differently?

- 8 Which errors, delays or performance failures occur most frequently?

- 9 What evidence shows that the problem is widespread or persistent?

- 10 Are there differences between new employees, experienced employees and high performers?

6.6

Interview Questions: Capability Requirements

- 11 What knowledge must employees possess to perform their roles effectively?

- 12 Which practical skills are most important?

- 13 Which behaviours distinguish effective from ineffective performance?

- 14 What should employees be able to do independently after appropriate development?

- 15 How could the required capability be demonstrated or assessed?

6.7

Interview Questions: Root Causes

16 Do employees understand what is expected of them?

17 Do they have the necessary tools, systems, information and authority?

18 Are current procedures practical and consistently applied?

19 What workload, staffing or time constraints affect performance?

20 How frequently do employees receive feedback and coaching?

21 What non-training factors may explain the performance gap?

6.8

Interview Questions: Learning and Workplace Support

22 What development has already been provided?

23 What results followed previous development initiatives?

24 What opportunities will employees have to practise new skills?

25 What support can managers provide after training?

26 What would prevent employees from applying what they learn?

6.9

Interview Questions: Priorities and Success Measures

27 Which performance gaps should be addressed first, and why?

28 What improvement would be meaningful to the department?

29 Which measures could be used to monitor progress?

30 Who should own the improvement plan?

6.10

Manager Interview Summary

Main business priorities identified:	
Most significant performance gaps:	
Evidence provided:	
Capability gaps requiring further assessment:	
Non-training factors identified:	
Recommended interventions:	
Manager commitments:	
Information still required:	
Next steps and responsible persons:	

6.11

Interviewer Reflection

After the interview, consider:

- Did the manager provide observable examples?
- Were conclusions supported by data or based mainly on perception?
- Did the manager distinguish the performance problem from its possible cause?
- Were the required performance standards clear?
- Were employee and workplace perspectives considered?
- Were any assumptions left unverified?
- Which findings should be checked with other stakeholders?

Record additional observations below.

SECTION

07

Workplace Observation Checklist

Observe work as it is done and record evidence of actual performance.

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Observation Planning Sheet	p. 68
Observation Checklist	p. 69
Detailed Observation Record	p. 70
Observation Summary	p. 71
Observation Ethics and Quality Checklist	p. 72

7.1

Purpose of Workplace Observation

Workplace observation allows the analyst to examine how tasks are performed under actual or representative working conditions.

It can reveal differences between documented procedures and everyday practice, as well as the influence of tools, workflow, workload and environmental conditions.

Observation is particularly useful when performance involves visible actions, practical skills, customer interactions, equipment operation or compliance with procedures.

Observation should be planned, relevant to the task and conducted in accordance with applicable organisational policies, privacy requirements and safety rules.

7.2

Observation Planning Sheet

Department or location:	
Role or task being observed:	
Observation date and time:	
Observer:	
Required performance standard:	
Purpose of observation:	
Procedure or reference document:	
Relevant safety or confidentiality considerations:	
Person responsible for confirming the standard:	

7.3

Observation Checklist

Mark the appropriate response and record supporting evidence.

Observation area	Meets standard	Partly meets	Does not meet	Not observed
Understands task objectives	☐	☐	☐	☐
Follows required procedures	☐	☐	☐	☐
Uses tools and systems correctly	☐	☐	☐	☐
Applies required knowledge	☐	☐	☐	☐
Performs practical steps accurately	☐	☐	☐	☐
Communicates clearly when required	☐	☐	☐	☐
Identifies and manages exceptions	☐	☐	☐	☐
Maintains required quality standards	☐	☐	☐	☐
Completes work within expected time	☐	☐	☐	☐
Records information accurately	☐	☐	☐	☐
Applies safety or compliance controls	☐	☐	☐	☐
Seeks assistance appropriately	☐	☐	☐	☐

Use "Not observed" when the observation does not provide enough evidence to assess the behaviour. Do not treat an unobserved behaviour as a failure.

7.4

Detailed Observation Record

Task step or behaviour observed:	
Expected standard:	
What happened:	
Evidence of effective performance:	
Observed difficulty or error:	
Contextual factors:	
Tools, information or support available:	
Questions to explore with the employee or manager:	

7.5

Observation Summary

What was performed effectively?

Where did performance fall below the standard?

Were the procedures and tools adequate?

Were expectations clear?

What capability gaps may require further assessment?

What non-training factors require investigation?

What additional evidence is required?

7.6

Observation Ethics and Quality Checklist

Before finalising the observation:

- ☐ The purpose of observation was clear.
- ☐ The required performance standard was established in advance.
- ☐ The observation focused on relevant work activities.
- ☐ Notes describe observable actions rather than personal judgements.
- ☐ Contextual factors were recorded.
- ☐ The employee's privacy and dignity were respected.
- ☐ Applicable workplace policies were followed.
- ☐ Safety and confidentiality requirements were respected.
- ☐ Findings were not generalised beyond the evidence collected.
- ☐ Important conclusions will be corroborated where appropriate.

SECTION

08

Training vs. Non-Training Decision Tool

Decide whether training, other interventions or a combination will close the gap.

IN THIS SECTION

Why This Decision Matters [p. 74](#)

The Four Diagnostic Questions [p. 74](#)

Training and Non-Training Diagnostic Matrix [p. 75](#)

Decision Worksheet [p. 77](#)

Intervention Decision [p. 78](#)

Example: Diagnosing a Sales Performance Problem [p. 79](#)

Example: Diagnosing a Leadership Performance Problem [p. 80](#)

8.1

Why This Decision Matters

A TNA should not end with a course recommendation simply because a performance gap exists.

Training can improve performance when employees need to acquire or strengthen relevant knowledge, skills or behaviours. However, it cannot independently resolve every workplace problem.

A well-designed decision process considers whether employees know what to do, can do it, have the opportunity to do it and are supported in doing it.

8.2

The Four Diagnostic Questions

Question 1: Do employees know what is expected?

Investigate whether employees understand:

- Their responsibilities.
- The required performance standards.
- Relevant policies and procedures.
- Priorities and deadlines.
- How their performance will be assessed.

If expectations are unclear, clarify them before assuming a training need exists.

Question 2: Do employees have the required capability?

Investigate whether employees possess the necessary:

- Knowledge.
- Technical skills.
- Practical skills.
- Decision-making ability.
- Communication behaviours.
- Problem-solving capability.

If a genuine capability gap is verified, learning or development may be appropriate.

Question 3: Do employees have the opportunity and resources to perform?

Investigate whether employees have:

- Functional tools and systems.
- Accurate and timely information.
- Adequate time and staffing.
- Clear processes.
- Appropriate authority.
- Access to necessary support.

If these conditions are inadequate, address the relevant barriers.

Question 4: Is effective performance supported and reinforced?

Investigate whether employees receive:

- Timely feedback.
- Coaching and guidance.
- Opportunities to practise.
- Recognition for effective performance.
- Consistent management support.
- Appropriate accountability.

If the workplace does not support the required behaviour, training alone may have limited impact.

8.3

Training and Non-Training Diagnostic Matrix

Diagnostic finding	Potential intervention
Employees lack essential knowledge	Structured learning, concise guides, demonstrations or knowledge checks
Employees understand the task but cannot perform it	Practical training, simulation, supervised practice and feedback
Employees can perform the task but apply it inconsistently	Coaching, observation, feedback and reinforcement
Expectations are unclear	Clarify role responsibilities, standards, targets and procedures
Procedures are inefficient or contradictory	Process review and redesign
Systems or equipment prevent effective performance	Technology, equipment or access improvements
Workload is unrealistic	Capacity planning, workload redistribution or staffing review
Approvals cause delays	Review decision rights and approval processes
Managers do not reinforce new behaviours	Manager enablement, accountability and structured follow-up
Employees lack current information	Improve knowledge access, documentation and communication
Performance problems have several causes	Coordinated intervention combining learning and workplace improvements

8.4

Decision Worksheet

Performance problem:

Required performance:

Actual performance:

Evidence of the gap:

Do employees understand what is expected?

☐ Yes ☐ Partly ☐ No ☐ Not yet verified

Evidence:

Do employees possess the required knowledge and skills?

☐ Yes ☐ Partly ☐ No ☐ Not yet verified

Evidence:

Do employees have the required tools, time, information and authority?

☐ Yes ☐ Partly ☐ No ☐ Not yet verified

Evidence:

Are effective behaviours supported by management and workplace systems?

☐ Yes ☐ Partly ☐ No ☐ Not yet verified

Evidence:

What is the most likely explanation for the gap?

What additional evidence is required?

8.5

Intervention Decision

Select the response best supported by the available evidence.

- ☐ Training is the primary intervention.
- ☐ Training and coaching are both required.
- ☐ Training must be combined with process or system improvements.
- ☐ Management expectations and support must be improved.
- ☐ A non-training intervention is more appropriate.
- ☐ Further diagnosis is required before a recommendation can be made.

Reason for the decision:

Proposed intervention:

Responsible owner:

Evidence that will demonstrate whether the intervention worked:

8.6

Example: Diagnosing a Sales Performance Problem

Initial request: Sales employees need negotiation training.

Observed problem: A sales team has missed its revenue target for two consecutive quarters.

Investigation findings:

- The number of qualified opportunities has declined.
- Several salespeople struggle to qualify customer needs.
- Proposal follow-up is inconsistent.
- Some opportunities are delayed because internal pricing approvals take too long.
- Sales conversion data is not recorded consistently.

Analysis:

The revenue shortfall cannot be attributed solely to negotiation capability.

Potential responses include:

- Sales skills development for verified qualification and negotiation gaps.
- A consistent follow-up process.
- Review of pricing approval delays.
- Improved sales pipeline data quality.
- Manager coaching and opportunity reviews.

CONCLUSION

Use training to address demonstrated capability gaps while correcting process and measurement issues that also affect performance.

8.7

Example: Diagnosing a Leadership Performance Problem

Initial request: Conduct leadership training for all managers.

Observed problem: Employee feedback indicates inconsistent performance management.

Investigation findings:

- Some managers avoid difficult performance conversations.
- Several managers are unfamiliar with the organisation's feedback framework.
- Performance expectations differ between departments.
- Senior leaders review performance issues inconsistently.
- Managers report limited time for one-to-one meetings.

Analysis:

The issue includes both capability and organisational factors.

Potential responses include:

- Training and practice in feedback conversations.
- Clearer performance management standards.
- Manager coaching and follow-up.
- Consistent senior leadership expectations.
- Review of workload and management responsibilities.

CONCLUSION

A leadership programme may help, but the organisation should align its management processes and reinforcement practices to support the desired behaviours.

SECTION

09

Training Needs Prioritisation Matrix

Compare needs consistently and sequence interventions with clear reasoning.

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Criteria for Prioritisation	p. 82
Training Needs Register	p. 84
Priority Assessment Worksheet	p. 85
Comparing Competing Needs	p. 86

9.1

Purpose of Prioritisation

Organisations often identify more development needs than they can address immediately.

A prioritisation matrix helps decision-makers compare needs consistently, explain trade-offs and sequence interventions.

Prioritisation should consider business importance as well as feasibility. A highly important need may require immediate risk controls even if a training programme cannot be delivered quickly.

9.2

Criteria for Prioritisation

Business Impact

How strongly does the gap affect business results, customers, operational performance or strategic objectives?

Urgency

How soon must the issue be addressed?

Risk

What could happen if the issue remains unresolved?

Population Affected

How many employees, teams, customers or stakeholders are affected?

Evidence Confidence

How reliable and complete is the information supporting the identified need?

Feasibility

Can the organisation implement the intervention effectively with the available time, resources and management support?

Cost of Inaction

What are the likely consequences of leaving the issue unresolved?

NOTE

Cost of inaction should be based on defensible evidence wherever possible. Avoid presenting speculative financial consequences as established savings or losses.

9.3

Training Needs Register

Use this register to consolidate the needs identified through interviews, questionnaires, observations, performance data and competency assessments.

ID	Identified need	Target group	Evidence source	Root cause status	Initial priority
TNA-01					
TNA-02					
TNA-03					
TNA-04					
TNA-05					
TNA-06					
TNA-07					
TNA-08					
TNA-09					
TNA-10					

9.4

Priority Assessment Worksheet

Complete one assessment for each significant need.

Need reference:	
Description of performance gap:	
Business impact rating (1–5):	
Urgency rating (1–5):	
Risk rating (1–5):	
Population affected rating (1–5):	
Evidence confidence rating (1–5):	
Feasibility assessment:	
Potential cost of inaction:	
Mandatory requirements or controls:	
Recommended priority:	
☐ Critical ☐ High ☐ Moderate ☐ Developmental ☐ Further evidence required	
Reason for the priority decision:	

9.5

Comparing Competing Needs

When several needs have similar scores, use a structured discussion rather than relying exclusively on arithmetic.

Consider:

- Which need presents the greatest consequence if ignored?
- Which need is directly linked to an agreed business priority?
- Which need has the strongest supporting evidence?
- Which intervention can reasonably improve the identified gap?
- Which needs share a common capability requirement?
- Which actions depend on process, system or management changes?
- Which interventions require immediate risk controls?
- Which interventions can be sequenced without compromising results?

Decision Record

Needs compared:	
Preferred need to address first:	
Reason for selection:	
Needs deferred:	
Reason for deferral:	
Dependencies:	
Decision owner:	
Review date:	

SECTION

10

TNA Summary Report Template

Turn the analysis into a clear document for decision-makers.

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Recommended Interventions	p. 94
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10.1

Purpose of the Summary Report

The TNA Summary Report converts analysis into a clear document for business leaders, department heads, HR and L&D decision-makers.

It should be concise enough to support decisions while containing sufficient evidence to explain the recommendations.

A report should distinguish confirmed findings from assumptions, unverified explanations and proposed actions.

10.2

Report Cover Information

Report title:	Training Needs Analysis Summary Report
Organisation:	
Department or business unit:	
Analysis period:	
Prepared by:	
Report date:	
Report version:	
Intended audience:	
Confidentiality classification, if applicable:	

10.3

Executive Summary

Business Context

Describe the business objective, operational challenge or capability requirement that initiated the analysis.

Purpose of the Analysis

Explain what the TNA was intended to establish.

Scope

Identify the departments, roles, employee groups, locations and performance areas included.

Methods Used

Summarise the data sources and methods used.

- ☐ Performance data review
- ☐ Employee questionnaire
- ☐ Manager interviews
- ☐ Employee interviews
- ☐ Workplace observation
- ☐ Competency assessment
- ☐ Document review
- ☐ Other:

Key Findings

Summarise the most important verified findings.

- 1
- 2
- 3

Main Recommendations

- 1
- 2
- 3

Decisions Required

Identify the approvals, resources or management actions required.

10.4

Scope and Methodology

Business units included:	
Roles assessed:	
Number of employees in scope:	
Number of employees assessed:	
Stakeholders consulted:	
Data sources reviewed:	
Assessment methods:	
Sampling approach, if applicable:	
Time period covered by the evidence:	

Limitations of the analysis:

Describe any limitations involving incomplete data, response rates, inconsistent measures, access restrictions or unverified findings.

10.5

Business Performance Findings

Performance area	Required result	Actual result	Gap	Business consequence
Area 1				
Area 2				
Area 3				
Area 4				

Interpretation

Which findings are most significant?

Which findings are supported by multiple sources?

Which findings require further investigation?

10.6

Competency Findings

Competency	Required capability	Current finding	Evidence	Development implication
Competency 1				
Competency 2				
Competency 3				
Competency 4				
Competency 5				

Interpretation

Most significant capability gaps:	
Groups most affected:	
Existing strengths to build upon:	
Areas where capability is already adequate:	

10.7

Root Cause Findings

Performance problem	Potential cause	Evidence	Confidence	Further action
Problem 1				
Problem 2				
Problem 3				
Problem 4				

Use confidence labels consistently.

High confidence: Multiple relevant sources support the explanation.

Moderate confidence: Evidence supports the explanation, but important questions remain.

Low confidence: The explanation is tentative and requires additional investigation.

NOTE

These labels are descriptive rather than statistical confidence estimates.

10.8

Recommended Interventions

Identified need	Recommended intervention	Target group	Priority	Responsible owner
Need 1				
Need 2				
Need 3				
Need 4				
Need 5				

For each recommendation, explain why the intervention is appropriate.

Recommendation 1

Performance gap:	
Evidence:	
Cause addressed:	
Recommended action:	
Expected improvement:	
Success measure:	

Workplace support required:

Repeat this structure for each significant recommendation.

10.9

Proposed Learning Plan

Programme or intervention	Target audience	Learning objectives or outcomes	Proposed method	Proposed timeframe
Intervention 1				
Intervention 2				
Intervention 3				
Intervention 4				

NOTE

At this stage, programmes and dates are proposals. Confirm delivery arrangements, participant availability, budget and dependencies before treating them as approved commitments.

10.10

Non-Training Action Plan

Training recommendations should be accompanied by actions addressing significant workplace barriers.

Issue	Required action	Owner	Target date	Evidence of completion
Process issue				
Technology issue				
Role clarity issue				
Management support issue				
Workload issue				

10.11

Success Measures and Follow-Up

For each major intervention, identify the evidence that will indicate whether the desired improvement has occurred.

Potential measures include:

- Knowledge assessment results.
 - Demonstrated practical competence.
 - Quality or accuracy measures.
 - Error and rework rates.
 - Completion of required procedures.
 - Manager observation of target behaviours.
- Customer feedback.
 - Service-level performance.
 - Productivity or throughput.
 - Application of skills in the workplace.
 - Relevant business outcomes.

Select measures that are genuinely connected to the intervention. Where other factors influence business results, do not attribute the entire change to training without appropriate analysis.

Baseline measure:

Target or desired change:

Data collection method:	
Measurement timeframe:	
Person responsible:	
Manager follow-up approach:	
Review date:	

10.12

Approval and Decision Record

Key recommendations approved:	
Recommendations deferred:	
Additional analysis required:	
Budget or resources authorised:	
Business owner:	
HR/L&D representative:	
Approval date:	
Next review date:	

SECTION

11

Training Action Plan

Convert approved recommendations into actions, owners and success measures.

IN THIS SECTION

From Analysis to Implementation	p. 99
Consolidated Action Plan	p. 99
Intervention Design Brief	p. 100
Learning Objectives Planner	p. 101
Learning Method Selection	p. 103
Post-Training Workplace Application Plan	p. 104

11.1

From Analysis to Implementation

A TNA creates value only when its findings inform appropriate action.

The Training Action Plan converts approved recommendations into defined activities, responsibilities, timeframes and success measures.

It should distinguish between:

- Learning interventions.
- Workplace or process improvements.
- Management support.
- Evaluation activities.
- Longer-term capability development.

11.2

Consolidated Action Plan

Action ID	Identified need	Action or intervention	Owner	Target date	Success measure	Status
ACT-01						
ACT-02						
ACT-03						
ACT-04						
ACT-05						
ACT-06						
ACT-07						
ACT-08						

Suggested status labels:

- Not started.
- In progress.
- Awaiting approval.
- Blocked.
- Completed.
- Under review.

11.3

Intervention Design Brief

Complete this brief for each approved learning intervention.

Intervention title:	
Business need:	
Performance gap:	
Target audience:	
Entry requirements, if any:	
Required learning outcomes:	
Competencies to be developed:	
Content or practice areas:	
Recommended learning methods:	
Assessment approach:	

Duration and delivery mode:	
Facilitator or provider requirements:	
Resources required:	
Manager involvement:	
Post-learning application plan:	
Success measures:	
Budget estimate:	
Approval status:	

11.4

Learning Objectives Planner

Learning objectives should describe what participants will be able to do after the learning experience.

Avoid objectives that describe only what the facilitator will cover.

Weak objective: "Understand communication."

Stronger objective: "Use clarification and summarising techniques to confirm customer requirements in a simulated service interaction."

Learning Objectives Worksheet

Target audience:

Required capability:

After the intervention, participants will be able to:

- 1
-
- 2
-
- 3
-
- 4
-

How will each objective be assessed?

Learning objective	Assessment method	Expected standard
Objective 1		
Objective 2		
Objective 3		
Objective 4		

11.5

Learning Method Selection

Choose learning methods based on the capability to be developed.

Capability requirement	Potential methods
Factual knowledge	Short learning modules, demonstrations, reference guides and knowledge checks
Procedural knowledge	Demonstration, guided practice, job aids and supervised application
Practical skill	Repeated practice, simulation, observation and feedback
Communication behaviour	Role-play, realistic scenarios, peer feedback and coaching
Leadership behaviour	Case discussions, simulations, reflective practice and manager coaching
Technical system use	Demonstration, sandbox practice, guided tasks and job aids
Decision-making	Cases, scenario analysis, decision exercises and structured debriefs
Long-term behaviour change	Practice, feedback, workplace goals, manager reinforcement and follow-up

The most appropriate method depends on the task, learner needs, risk level, available resources and required standard of performance.

11.6

Post-Training Workplace Application Plan

Programme or intervention:	
Participant or group:	
Target behaviour or skill:	
Workplace task where it will be applied:	
Opportunity to practise:	
Manager or coach providing support:	
Expected application date:	
Evidence of application:	
Feedback method:	
Review date:	
Barriers to application:	
Corrective action, if required:	

SECTION

12

Evaluation and Follow-Up Planner

Plan evaluation early, using the original need as the reference point.

IN THIS SECTION

Why Evaluation Should Begin During TNA

[p. 106](#)

Four Areas of Evaluation

[p. 106](#)

Evaluation Planning Worksheet

[p. 108](#)

Baseline and Target Planner

[p. 109](#)

Follow-Up Review

[p. 110](#)

12.1

Why Evaluation Should Begin During TNA

Evaluation is more useful when planned before a learning programme is delivered.

The original TNA establishes the business issue, the required performance, the baseline evidence and the intended improvement.

These become the reference points for evaluating whether an intervention was effective.

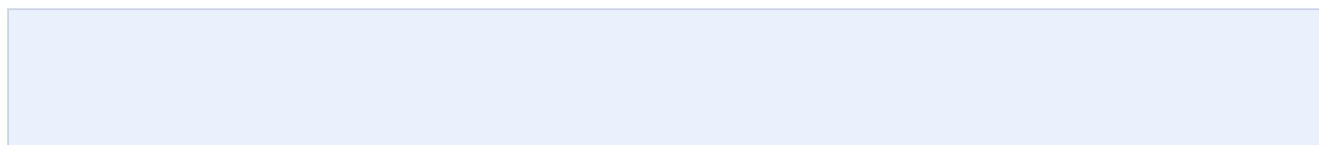
If the organisation does not know what performance looked like before training, it may be difficult to determine whether meaningful improvement occurred afterwards.

12.2

Four Areas of Evaluation

Area 1: Learning Experience

Did participants find the learning relevant, accessible and useful?



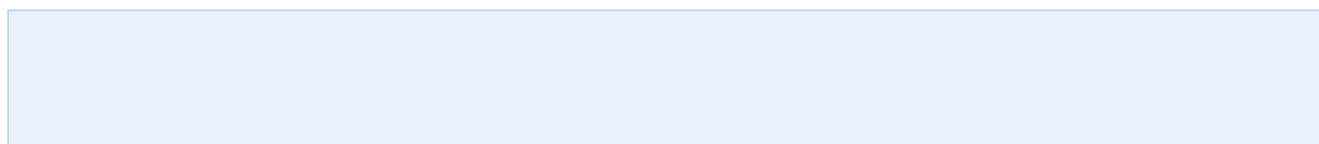
Possible evidence:

- Participant feedback.
- Relevance ratings.
- Quality of facilitation.
- Perceived applicability.

Positive feedback is useful, but it does not prove that learning occurred.

Area 2: Learning Achievement

Did participants acquire the intended knowledge or skill?

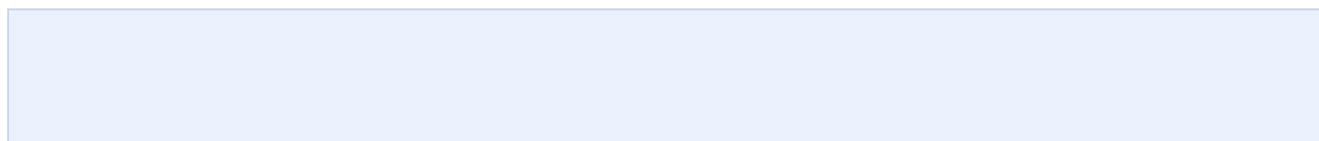


Possible evidence:

- Knowledge checks.
- Practical demonstrations.
- Scenario assessments.
- Skills assessments.
- Work simulations.

Area 3: Workplace Application

Are participants applying the learning in their roles?

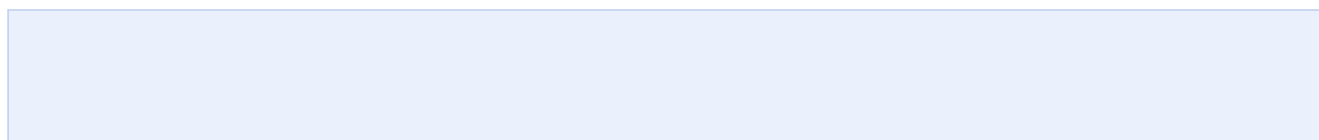


Possible evidence:

- Manager observation.
- Work samples.
- Behavioural checklists.
- Quality reviews.
- Structured follow-up discussions.

Area 4: Business Results

Did relevant workplace or business measures improve?



Possible evidence:

- Error rates.
- Productivity.
- Sales conversion.
- Customer service performance.
- Compliance results.
- Rework or delay measures.

Business results are influenced by many factors. When making claims about the contribution of training, consider other changes that occurred during the same period.

12.3

Evaluation Planning Worksheet

Intervention:	
Business objective:	
Performance gap addressed:	
Baseline evidence:	
Intended learning outcome:	
Expected workplace behaviour:	
Expected business improvement:	

Evaluation area	Indicator	Data source	When measured	Owner
Learning experience				
Learning achievement				
Workplace application				
Business results				

12.4

Baseline and Target Planner

Performance measure:	
Definition of the measure:	
Baseline value:	
Baseline measurement period:	
Desired value or improvement:	
Target timeframe:	
Data source:	
Measurement owner:	
Known influencing factors:	

How will changes be interpreted?

Targets should be realistic, measurable and agreed with the relevant business owner. Where reliable data is unavailable, establish a baseline before making strong claims about improvement.

12.5

Follow-Up Review

Programme or intervention:

Review date:

Participants or group reviewed:

What learning was demonstrated?

What behaviours are being applied?

What evidence supports the findings?

What performance measures have changed?

What other factors may have contributed?

What barriers remain?

What additional support is needed?

Should the intervention be continued, revised or discontinued?

Decision rationale:

SECTION

13

Practical TNA Case Studies

Apply the process to five realistic workplace situations.

IN THIS SECTION

Case Study 1: Declining Sales Conversion

[p. 113](#)

Case Study 2: High Error Rates in Operations

[p. 115](#)

Case Study 3: First-Time Manager Challenges

[p. 117](#)

Case Study 4: Customer Service Delays

[p. 119](#)

Case Study 5: Low Application After Training

[p. 121](#)

CASE STUDY 1

Declining Sales Conversion

Business Situation

A B2B sales department has experienced declining conversion rates over the past two quarters. The sales director requests a two-day negotiation skills programme for the entire sales team.

Initial Evidence

- Qualified leads have increased slightly.
- A smaller proportion of proposals convert into sales.
- Sales managers report inconsistent follow-up.
- Customer interviews indicate that some proposals do not address the customer's actual priorities.
- The organisation has limited data on negotiation behaviours.

TNA Questions

- What is the specific business performance gap?
- Which sales stages are contributing to the decline?
- What evidence is available about qualification, discovery, proposal quality and follow-up?
- Which competencies should be assessed?
- What other factors might explain the decline?
- Which employees or teams need development?
- How should improvement be measured?

Analysis Worksheet

Required sales performance:

Actual sales performance:

Verified performance gap:

Evidence required:

Potential capability gaps:

Potential non-training factors:

Recommended diagnostic actions:

Proposed intervention:

Success measures:

FACILITATOR DISCUSSION

The request for negotiation training should not automatically determine the solution. The analysis may identify gaps in discovery, qualification, proposal development, follow-up or negotiation. Each requires different learning objectives and may also depend on sales processes and management practices.

CASE STUDY 2

High Error Rates in Operations

Business Situation

An operations department reports increasing transaction errors. Management requests refresher training for all employees.

Initial Evidence

- Errors occur more frequently during peak workload periods.
- Some employees use outdated work instructions.
- New employees report limited supervised practice.
- The system interface has recently changed.
- Error reporting is inconsistent across shifts.

TNA Questions

- What types of errors are occurring?
- Which errors have the greatest consequences?
- Are the errors related to knowledge, practical skill, system design or workload?
- Are current procedures accurate and accessible?
- Do employees receive sufficient practice?
- Are performance standards consistent across shifts?
- Which measures can demonstrate improvement?

Analysis Worksheet

Error types:	
Current error rate:	
Required quality standard:	
Affected tasks and employee groups:	
Evidence sources:	
Potential causes:	
Required non-training actions:	
Required learning intervention:	
Quality and follow-up measures:	

FACILITATOR DISCUSSION

A refresher programme may help address a knowledge or skill gap, but it will not resolve outdated procedures or system design problems. The recommended response should address each verified cause.

CASE STUDY 3

First-Time Manager Challenges

Business Situation

An organisation has promoted several high-performing employees into management roles. Employee feedback indicates inconsistent delegation, unclear priorities and limited feedback conversations.

The HR team requests a standard leadership programme.

Initial Evidence

- New managers have strong technical expertise.
- Some struggle to delegate responsibility.
- Employees receive inconsistent performance feedback.
- Manager expectations differ across departments.
- Senior managers have limited time for coaching.

TNA Questions

- Which management responsibilities are not being performed effectively?
- What behaviours distinguish effective managers in this organisation?
- What knowledge or skills do new managers lack?
- Are role expectations clearly defined?
- What support is available from senior managers?
- Should all new managers receive the same programme?
- What workplace evidence will indicate improvement?

Analysis Worksheet

Required management performance:

Observed gaps:

Supporting evidence:

Required competencies:

Differences between managers:

Organisational barriers:

Recommended development approach:

Senior management support required:

Success measures:

FACILITATOR DISCUSSION

A structured development programme may be appropriate, but managers may also need clearer expectations, practical tools, opportunities to practise and continued coaching. The programme should reflect the verified gaps rather than assume every new manager has identical development needs.

CASE STUDY 4

Customer Service Delays

Business Situation

A customer service team is missing response-time targets. The department head requests communication training.

Initial Evidence

- Employees communicate professionally during reviewed interactions.
- Delays occur when cases require approval from another department.
- Some employees cannot access current product information.
- Case ownership is unclear when requests are transferred.
- A small number of employees struggle to explain complex solutions.

TNA Questions

- Which part of the service process creates the delay?
- What is the required response-time standard?
- What evidence identifies the main causes?
- Which employees demonstrate a communication capability gap?
- What process or information barriers must be removed?
- What should be changed in the handover process?
- How will improvements be monitored?

Analysis Worksheet

Service standard:	
Current response performance:	
Main sources of delay:	
Evidence:	
Verified communication gaps:	
Process and system issues:	
Recommended interventions:	
Success measures:	

FACILITATOR DISCUSSION

The analysis may support targeted communication development for some employees, while process changes and clearer case ownership may have greater impact on overall response times.

CASE STUDY 5

Low Application After Training

Business Situation

An organisation has delivered several training programmes, but managers report little visible change in workplace behaviour.

The L&D team proposes making future programmes longer.

Initial Evidence

- Participants generally rate programmes positively.
- Knowledge checks show reasonable learning gains.
- Managers rarely discuss application goals with participants.
- Employees have few opportunities to practise new methods.
- Existing performance measures do not capture the behaviours taught.
- Follow-up is inconsistent.

TNA Questions

- Is the problem a lack of learning or a lack of workplace application?
- What evidence supports the conclusion?
- Do participants have opportunities to practise?
- Do managers understand the behaviours that should change?
- Are performance systems reinforcing the desired behaviours?
- What workplace support should be introduced?
- Which measures can demonstrate transfer?

Analysis Worksheet

Original training objectives:	
Evidence of learning achievement:	
Evidence of workplace application:	
Potential barriers to transfer:	
Manager support required:	
Changes to the evaluation approach:	
Recommended intervention:	
Follow-up plan:	

FACILITATOR DISCUSSION

Longer programmes do not automatically produce stronger workplace application. The organisation may need better practice design, manager involvement, application opportunities and post-training follow-up.

SECTION

14

Master TNA Worksheets

Reusable overviews, registers and checklists for any analysis.

IN THIS SECTION

One-Page TNA Overview

[p. 124](#)

TNA Evidence Register

[p. 125](#)

Assumptions and Questions Register

[p. 126](#)

TNA Stakeholder Communication Plan

[p. 126](#)

TNA Quality Review Checklist

[p. 127](#)

14.1

One-Page TNA Overview

Organisation or department:	
Business objective:	
Problem or opportunity:	
Required performance:	
Actual performance:	
Evidence of the gap:	
Target group:	
Main capability gaps:	
Potential root causes:	
Non-training factors:	
Recommended intervention:	
Priority:	
Success measures:	
Responsible owner:	

Next review date:

14.2

TNA Evidence Register

Use this register to maintain traceability between findings and their supporting evidence.

Evidence ID	Finding supported	Evidence source	Collection date	Limitations	Analyst
E-01					
E-02					
E-03					
E-04					
E-05					
E-06					
E-07					
E-08					

Evidence handling notes:

14.3

Assumptions and Questions Register

Not every issue can be resolved during the initial analysis. Record assumptions and unanswered questions so they can be verified.

ID	Assumption or question	Why it matters	Verification method	Owner	Status
Q-01					
Q-02					
Q-03					
Q-04					
Q-05					

14.4

TNA Stakeholder Communication Plan

Stakeholder group	Information required	Communication method	Responsible person	Timing
Senior leadership	Findings and decisions required			
Department managers	Performance gaps and proposed actions			
Employees	Purpose, process and relevant next steps			
HR/L&D	Capability priorities and intervention options			
Process or technical owners	Non-training issues and dependencies			

14.5

TNA Quality Review Checklist

Before presenting the findings, confirm that the analysis is sufficiently complete for the intended decision.

Business Alignment

- ☐ The business need is clearly defined.
- ☐ The required performance standard is documented.
- ☐ Relevant stakeholders have been consulted.
- ☐ The business consequences of the gap are understood.

Evidence

- ☐ Findings are supported by relevant evidence.
- ☐ Evidence sources and limitations are documented.
- ☐ Actual and required performance are compared consistently.
- ☐ Important conclusions have been corroborated where appropriate.

Diagnosis

- ☐ Potential root causes have been investigated.
- ☐ Capability gaps are distinguished from process and resource issues.
- ☐ Unverified assumptions are clearly identified.
- ☐ The target audience has been defined appropriately.

Prioritisation

- ☐ Significant needs have been prioritised.
- ☐ Mandatory risk and compliance requirements have been considered.
- ☐ The rationale for prioritisation is documented.
- ☐ Feasibility and dependencies have been considered.

Recommendations

- ☐ Each recommendation addresses an identified need.
- ☐ Learning outcomes are linked to required performance.
- ☐ Non-training interventions are included where appropriate.
- ☐ Success measures and ownership are defined.

Implementation and Evaluation

- ☐ Workplace application opportunities have been considered.
- ☐ Manager support requirements are documented.
- ☐ Baseline and follow-up measures are planned.
- ☐ A review date has been identified.

Governance and Reporting

- ☐ Confidentiality requirements have been followed.
- ☐ Personal information has been handled appropriately.
- ☐ Findings are presented objectively.
- ☐ Decisions and unresolved questions are documented.

Overall review result:

- ☐ Ready for decision
- ☐ Ready with limitations documented
- ☐ Further analysis required

Reviewer:

Review date:

Required corrections or follow-up:

SECTION

15

TNA Glossary and Quick Reference

Key terms, essential questions and working principles at a glance.

IN THIS SECTION

Key Terms

[p. 130](#)

Quick Reference: The TNA Questions

[p. 131](#)

The TNA Analyst's Working Principles

[p. 131](#)

15.1

Key Terms

Training Needs Analysis (TNA)

A structured process for identifying performance gaps, investigating their causes and determining appropriate learning or other interventions.

Business Need

A performance requirement or opportunity linked to organisational objectives, operational effectiveness or stakeholder expectations.

Performance Standard

A defined expectation describing the required level of output, quality, behaviour or task execution.

Performance Gap

The difference between required and actual performance.

Competency

A combination of relevant knowledge, skills and behaviours required for effective performance in a role or task.

Competency Framework

A structured description of the competencies and proficiency levels required for particular roles or job families.

Root Cause

An underlying factor that contributes to a problem. Root causes should be supported by evidence rather than assumed from the initial complaint.

Evidence Source

A data source, observation, document, assessment or stakeholder input used to support an analysis.

Baseline

A documented starting point against which later performance can be compared.

Learning Objective

A statement describing what a learner should be able to demonstrate as a result of a learning experience.

Learning Transfer

The application of knowledge or skills acquired through learning to relevant workplace situations.

Workplace Reinforcement

Supportive conditions and actions that help employees practise, sustain and improve the required behaviours.

Non-Training Intervention

An action that addresses a performance problem without relying primarily on formal learning, such as process redesign, improved tools or clearer expectations.

Training Evaluation

The systematic collection and interpretation of evidence about the learning experience, learning achievement, workplace application and relevant results.

Training Priority

The relative importance or urgency of addressing an identified learning need.

TNA Evidence Register

A record connecting analysis findings to the evidence supporting them.

15.2

Quick Reference: The TNA Questions

Before recommending training, ask:

- What business result needs improvement?
- What is the current performance?
- What performance is required?
- What evidence confirms the gap?
- Who is affected?
- Which competencies are required?
- What is causing the gap?
- What non-training factors are involved?
- Which needs should be addressed first?
- What intervention best addresses each verified cause?
- How will success be measured?
- What support will enable workplace application?
- Who is responsible for the action?
- When will the findings and outcomes be reviewed?

15.3

The TNA Analyst's Working Principles

Start with the business need. Do not begin with a course catalogue.

Define performance clearly. Broad expectations must be translated into observable standards.

Gather evidence from more than one source when appropriate. A single opinion rarely provides a complete diagnosis.

Separate the gap from its cause. Knowing that performance is low does not explain why.

Investigate non-training factors. Employees need appropriate processes, tools, information, time and support.

Prioritise transparently. Explain why one need deserves attention before another.

Make recommendations specific. Identify the target audience, capability, intervention and intended result.

Plan for application. Learning should connect to real work and include opportunities to practise.

Evaluate against the original need. Measure relevant improvement rather than relying only on attendance or participant satisfaction.

Document uncertainty. A responsible analysis distinguishes verified findings from hypotheses and outstanding questions.

SECTION

16

Final TNA Action Summary

Consolidate the findings and record the final decision.

IN THIS SECTION

Final TNA Action Summary

[p. 133](#)

SECTION 16

Final TNA Action Summary

Use this final worksheet to consolidate the findings and identify the next actions.

A. Business Need

What business problem or opportunity initiated the analysis?

B. Verified Performance Gap

What is the difference between required and actual performance?

C. Supporting Evidence

Which data, observations or assessments support the conclusion?

D. Root Cause

What factors are contributing to the performance gap?

E. Capability Requirement

Which knowledge, skills or behaviours need to improve?

F. Non-Training Requirements

Which process, system, resource or management issues must be addressed?

G. Priority

How urgent and important is the need, and why?

H. Recommended Intervention

What action is most likely to address the verified cause?

I. Success Measures

What evidence will demonstrate improvement?

J. Ownership

Who will be responsible for implementation and follow-up?

K. Timeline

What are the key dates, milestones and review points?

L. Final Decision

- ☐ Approve the proposed learning intervention.
- ☐ Approve a combined learning and non-training intervention.
- ☐ Approve a non-training intervention.
- ☐ Conduct further analysis before proceeding.
- ☐ Defer the intervention pending additional information or resources.

Decision rationale:	
Decision owner:	
Date:	
Next review date:	

CONCLUSION

From Training Requests to Evidence-Based Decisions

Training Needs Analysis is not simply a preliminary administrative step before a programme is scheduled.

It is a decision-making process that connects business priorities, workplace performance, employee capability and organisational support.

A well-conducted TNA helps answer three essential questions:

- What needs to improve?
- Why is improvement needed?
- What action is most likely to produce the required result?

The answers may lead to training, coaching, improved processes, better tools, clearer standards, stronger management support or a combination of interventions.

The value of the analysis lies in the quality of the evidence and the suitability of the action that follows.

Use this starter pack as a working document. Adapt the worksheets to the organisation, retain evidence of important findings, document limitations and revisit recommendations as conditions change.

The ultimate aim is not to conduct more training.

It is to build the capability, systems and workplace conditions that enable people to perform effectively.

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