Instructional Need

Dick & Carey (2014) describe a needs analysis, which is also called a Needs Assessment, as the desired status minus the actual status equals the need. That is, the gap between the desired and the actual is the need.

Note that the terms needs assessment and needs analysis do not necessarily mean the same thing. **Needs Assessment** refers to determining the 'gap' that can be solved by training. **Needs Analysis** goes one step further and looks at the root cause of the problem. For this eBook we will be looking at needs assessment.

We need training for this!

More often than not, you will be asked to create a training program to solve a business problem. However, it is not always the case that the problem can or should be solved by training.

Training is expensive and time consuming. Doing a proper training needs analysis can help you determine if training is the right solution to the problem but will also help you collect the information you will need to design an efficient and effective training program.

For example, as the training manager I was asked to develop customer training for a product. However, I quickly realized that customers would not pay for training. The issue that customers had was not that they needed or wanted training, rather that the documentation was inefficient and incorrect. Fixing the documentation solved the business problem, not training.

The way that we determine if training is the right solution as well as which training is the right solution is by performing a training needs assessment.

Here are some examples of times when training might not be the right solution to the problem, and alternative solutions that might be more appropriate.

Fix the problem

Many times you'll be asked to create training for something that isn't a training problem. For example, if a user interface on a computer application isn't well designed - you might be asked to create training to teach people how to use the application. Often, changes to the user interface can be made to avoid the need for training. Fixing the problem in the product design is a more effective solution than training around the problem.

Redesign the process

Sometimes you are asked to create training to teach people how to perform complex tasks or workflows. Sometimes these complex tasks or workflows can be redesigned to be less complicated. When this is possible it is a better solution to the problem.

Write documentation

Training is a lot more expensive to produce than good user documentation. Also, people often would prefer to look up what they need to know when they need to know it. If there is no good documentation, you'll need to ask if

documentation alone would solve the problem. You may find that you need to create documentation in order to create the training anyways.

Good documentation can be a real asset when designing training.

Create a job aid

A job aid is something that can be used directly on the job that replaces the need for specific training. An example of a job aid is a handwashing poster that is placed right over the sink. The poster is more efficient and effective at getting people to wash their hands properly than a course in handwashing.

Organizational need statement

> *"The logic of needs assessment can be summarized as a simple equation:*
>
> *Desired status – Actual status = Need*
>
> *Needs assessment is sometimes called discrepancy analysis. The discrepancy is the observed difference between the desired status and the actual status." ([Dick, Carey, & Carey](), 2014, p.23).*

The first part of the organization need statement is a short description of the organizational context. Understanding the organizational context helps make better design decisions. Creating training materials for one type of industry may require different solutions than another industry. If you are an instructional designer that is not part of the organization, it is important that you ensure that your assumptions about the organizational context are correct. Things that you might wish to include in the organizational context are:

- The name of the organization.
- What industry/sector is the organization in? Solutions for corporate clients are different than academic clients or non-profit clients. Also, what you create for a banking client might be quite different than what you create for a museum.
- What is the size of the organization?
- Where are they located?

The next part of the need statement outlines the need itself. In your needs statement you want to highlight the desired status, the actual status, and therefore what you interpret the need to be.

Corporate Sector Example

AwesomeID is a mid-sized (approx. 250 people) instructional design consulting firm, located somewhere in the USA. The majority of their clients are government agencies, however, they also do some projects with corporate sector clients. AwesomeID has identified that instructional designers are spending too much time evaluating learning technologies. This in-turn is causing the designers to not meet their deadlines. Instructional designers need to be more efficient at choosing which technologies will make their jobs easier. They need to be able to integrate new technologies into their designs without missing important deadlines.

Higher Education Example

The University of Massachusetts Boston has an instructional design program with approximately 70 students at any given time. Instructional design students are exposed to new technologies throughout their studies. The technology is constantly changing. In order to be effective students, they need to be able to quickly evaluate new tools to determine if they are effective for either designing instruction or delivering instruction. They need to be able to pick up the basics of a tool in a minimal amount of time. In addition, they need to be able to figure out when to stop learning a technology because it is not one that will provide value. Most importantly, they need to be able to manage their time so that they get their assignments completed on-time.