**Establishing Training Needs Checklist**

***Note:*** *Feel free to adapt or develop this checklist to meet your needs*

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| **Action:** | **Complete:** | **Notes:** |
| **Business Goals and Plans**  Take a step back and think about what you want to achieve as a business to really figure out your training needs, as these should be principally aligned to help you achieve your business goals.  You may have some ideas in mind such as:   * To have a competitive edge over other businesses in your sector * To have the right skilled employees in the right place at the right time * To hold onto your talented employees * To grow your business * To gain efficiencies   Knowing what will take you toward success and how you can measure the success of your goals will help you identify any training needs |  |  |
| **Where Are We Now?**  The training needs in your business are likely to vary. It is helpful to take a snap shot of where you are now, so you have a starting point to focus needs versus:   * Business needs * Team needs * Individual needs   The table below can help you visualise this: |  |  |

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| **Current Level** | | **Business Need** | **Team/Group Need** | **Individual Need** |
| **Implementing** | Doing things well | Meet current business objectives | Working together to meet existing targets and standards | Being competent at the level of existing requirements |
| **Improving** | Doing things better | Setting higher objectives and reaching them | Continuous improvement in teams | Having and using systematic continuous improvement skills and processes |
| **Innovating** | Doing new and better things | Changing objectives and strategies | Working across boundaries to create new relationships and new products and services | Being able to work differently and more creatively with a shared sense of purpose |

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| **Action:** | **Complete:** | **Notes:** |
| **Data on Productivity, Quality and Performance**  If you measure business output or other key performance indicators this gives you solid information to analyse where improvements could and should be targeted |  |  |
| **Budgets**  Affordability will be a key factor in carrying out training. Identify what your budget is, is this enough to meet critical business requirements or does your business need you to invest more. There are lots of options for training to manage costs. Many companies assign budget for 2 training days per year per employee or 2% of wages bill as training budget |  |  |
| **Action:** | **Complete:** | **Notes:** |
| **Look At Your Jobs**   * Are there any problems faced by job holders in learning the basic skills and applying them successfully? * Are there any weaknesses in the performance of existing job holders arising due to gaps in knowledge, skills motivation? * Are there areas where competence isn’t up to the required standard? * Are there any areas where future changes in work methods, processes, equipment or responsibilities will indicate a learning need? * Are there future skills that are needed for your industry? * How is training carried out now – is it effective? |  |  |
| **Training Requests**  If you encourage employees to ask for training they feel is needed you can log this and identify any wider patterns of training needs |  |  |
| **Performance Reviews**  Individual learning and development needs come out of effective performance reviews between the manager and the team. These normally take the form of regular supervisions, performance appraisal, personal development plans and capability plans |  |  |
| **Action:** | **Complete:** | **Notes:** |
| **Employee Surveys**  If you undertake an employee survey to seek feedback from your employees about the workplace, this can be an excellent source of input around current training provisions |  |  |
| **Reasons People Give For Leaving**  Exit interviews can give good insight into why people leave. These commonly relate to how they feel about autonomy in their role, the opportunities available to them and how they have been managed. If you are seeing your talented people leave this could be an area you need to target with training |  |  |