

Performance Analysis & Needs Assessment

Principles, Practices & Resources

First: The Rationale

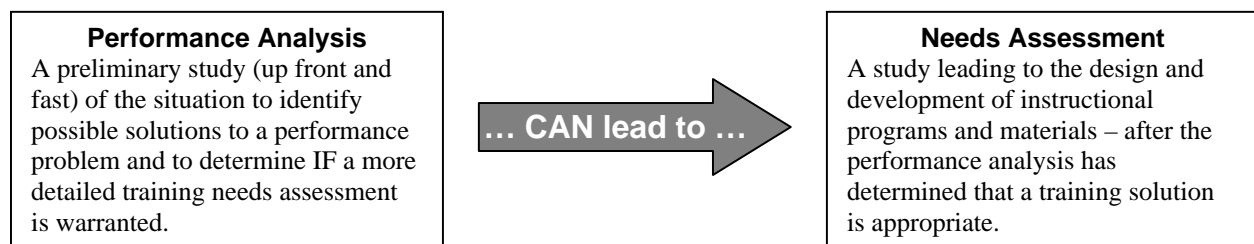
“The danger in leaping from apparent problem to apparent solution is that large amounts of time and money can be spent in throwing training at a problem that training cannot solve. You need to dig a little deeper. This is why a procedure like performance analysis is important to those who actually want to solve problems – rather than just talk about them.”

Mager

Second: Key Definitions

Performance Analysis <i>Rossett</i>	A “process by which you partner with clients to identify and respond to problems and opportunities, and to study individuals and the organization to determine an appropriate cross-functional solution system.”
Needs Assessment <i>Rossett</i>	A “systematic study that incorporates data and opinions from varied sources in order to create, install, and evaluate educational ... products and services.”
Performance Gap <i>Mager & Pipe</i>	“A discrepancy (gap) is a difference ... between what is and what should be. ... Human performance discrepancies [are] those differences between what people are actually doing ... and what they should be doing.”
Audience Analysis <i>Rossett</i>	A “study that describes the nature of the ... students. Who are they? What do they already know? Are they confident? Have they volunteered to participate? How many are in the target population? What kinds of technology support are available to them? Are their managers interested in this topic, in their development in this domain?”
Task Analysis <i>Mager</i>	A “step-by-step description of what a competent person does when performing a relatively sequential task, whether the steps of that task are mainly cognitive (mental) or psychomotor (physical). It is a way of making competent performance visible, much as a blueprint provides a way to make the components of a finished product visible.”
Goal Analysis <i>Mager</i>	A process to “define the indefinable ... to help you say what you mean by your important but abstract goals. ...to identify the main performances that constitute the meaning of the goal. Once you know the performances that collectively define the goal, you will be in a better position to decide which of these performances need to be taught and which need to be managed.”

Third: The Relationship



Fourth: Principles & Questions

Know the Business	Know your client's business. What are their objectives? What are their challenges? What do they value?
Define the Gap	Document the difference between optimal and actual. What should happen? What does happen? How do you know? Who wants it solved?
Clarify the Costs	Identify the price of the problem. What is lost if nothing is done? What is gained if we fix it?
Look for Causes, Enablers and Obstacles	Question the assumptions and potential solutions. What is causing the problem? What will prevent a solution? What will make a solution easier?
Focus on Key Sources	Find and focus on the people who are close to the problem and have perspective on the issues. Don't try and reach everyone – especially in a performance analysis.
Focus on Facts and Results	Look for data, through observations, records, experiences. What evidence is there? Is it consistent? What does it tell us? Is there more?

Fifth: Mager's Questions

- ▶ What is the performance discrepancy?
(Describe actual and desired performance)
- ▶ Is it worth pursuing? What evidence suggests that it is? (if not, drop)
- ▶ Are the expectations for performance clear?
(if not, clarify)
- ▶ Are the resources adequate? (if not, provide)
- ▶ Is the performance quality visible? (if not, provide)
- ▶ Is the desired performance punishing?
(if yes, remove punishment)
- ▶ Is poor performance rewarding? (if yes, remove reward)
- ▶ Are performance consequences used effectively?
(if not, provide consequences)
- ▶ Is there a genuine skill deficiency? Have they done it in the past? Do they use it often?
- ▶ Can the task be made easier?
- ▶ Does the person have the potential to do the task?

Sixth: Resources

Articles

- ▶ *Conducting a Customer-Focused Performance Analysis* Grant & Moseley, July 1999, Performance Improvement
- ▶ *How to Do a Needs Assessment When You Think You Don't Have Time* Zemke, March 1998, Training Magazine
- ▶ *Rapid Analysis Model* Lee & Owens, January 2001, Performance Improvement
- ▶ *Rapid Analysis: Matching Solutions to Changing Situations* Brethower, November/December 1997, Performance Improvement

Books

- ▶ *Analyzing Performance Problems* (Mager & Pipe)
- ▶ *Figuring Things Out: A trainer's guide to needs and task analysis* (Zemke & Kramlinger)
- ▶ *First Things Fast* (Rossett)
- ▶ *Goal Analysis* (Mager)
- ▶ *Training Needs Assessment* (Rossett)

Web Sites

- ▶ www.astd.org
- ▶ www.ispi.org
- ▶ www.trainingsupersite.com

