In want of a needs analysis: getting to a management program's content and initial design

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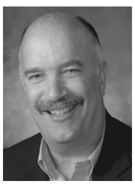

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The bridge between obtaining a new engagement for a non-degree management education program and the program's design is a learning needs analysis. But what should this learning needs analysis process look like? We have created the following model on the foundations of earlier work by one of us (Clawson and Haskins, 2006) and believe it offers a valuable framework to produce a robust learning needs analysis.

It is a trio of tasks and a quartet of foci

A learning needs analysis is a process of discovery, translation, and convergence:

- Discovery is the organized, systematic process of identifying the issues to be addressed in the educational program.
- Translation is the codifying, synthesizing, and operationalizing of articulated client needs into specific, actionable program themes.
- Convergence is the iterating with a client the translation-generated program themes into an agreed-on initial program design that is integrated, reflects the client's desired relative thematic weightings, and represents a potentially powerful pathway to meeting the client's learning needs.

The discovery phase involves four foci. The first pertains to an in-depth debrief of the primary client contact. Often, this person has a good idea of a program's general needs but without enough specificity for an instructor to design a deliverable program. Those general notions do establish, for those conducting the needs analysis, an acute sensitivity to the most appropriate information to be gleaned from the next three foci.

The second focus involves a thorough scouring of public documents that provide information on the client's business, recent performance, products, and strategic direction. Here, the company's most recent annual report is useful as is an internet search for pertinent company news. Portions of a company's website are also useful especially those providing access to recent executive speeches, descriptions of existing business initiatives, and recent organizational changes.

The third focus targets a review of internal client documents that pertain to the objectives for the educational program. Client strategy documents, vision and values statements, employee attitude surveys, benchmarking studies, and employee competency models are important items to review. Such sources of information are helpful because of their specificity and generally broad-based client acceptance.

The fourth focus, lying at the heart of a needs analysis, involves on-site and/or phone interviews of two client groups – senior executives and potential program attendees. We tend to weight the interviews about 3 to 1 in favor of senior executives – their support is key. Both interviewee groups should be probed for their program expectations and for

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leverageable business examples. It is important to include phone interviews with globally deployed executives – it is a cost-effective way to obtain their input.

For the interviews, it is best to involve two colleagues. Simply, two sets of resultant interview notes are richer than one. In addition, one of the interviewers can take the lead on a question while the other is mentally preparing for the next. More than two interviewers is cumbersome and redundant. Whether the interviewing duo is two instructors or one instructor and a senior administrator, it does not matter. It is best, however, that one of the instructors be the team leader for the ensuing program design and delivery.

Do not forget the interview protocol

When conducting needs analysis interviews, it is helpful to use an interview protocol. That protocol should go to interviewees in advance so they have time to formulate responses. The protocol helps interviewers gather responses that can be compared and contrasted. Below a sample protocol is depicted.

A sample needs analysis interview protocol

The purpose of our interviews is to identify the set of business challenges senior management wants included in the management program we have been tasked to develop. A typical interview consists of two instructional team representatives meeting with you for about 45 minutes. The following questions depict the essence of our intended discussion areas:

1. What are the key issues and challenges currently facing the organization that should be addressed in this educational partnership? What rank order would you assign to the items you mentioned?
2. Think of one or two high-performing, successful managers in your organization. What is it about them that make them successful?
3. Think of a recent failure or misstep your organization experienced/made. Why did that happen?
4. In general, what would you like to see as the personal developmental outcome for the program attendees as a result of their program attendance?
5. In your opinion, how important is this educational program initiative? Why do you say that?
6. Describe the metrics used to measure performance. Are there desired managerial behaviors/foci not prompted by these metrics? If so, please elaborate.
7. Describe how your organization has changed over the past three to five years? What may have been ''lost'' that needs to be recaptured? What is ''new'' that needs reinforced?
8. Would you say likely program attendees should be more collaborative at work? Why or why not?
9. Are there some voices the attendees should hear either in person, by video, or via a recent book? If so, who and why?
10. What organizations do you most admire, other than yours, and why?
11. What do your vendors, customers, employees, and investors most often say about your organization?
12. Do you believe there should be a program-ending deliverable? If so, what might that be? Would you be willing to devote time to participating in that deliverable activity?

“The task of undertaking a needs analysis is a process of discovery, translation, and convergence.”

> **“In conducting on-site or phone needs analysis interviews, it is always a good idea to craft an interview protocol.”**

Getting to an initial design

The discovery phase of the needs analysis should be completed in as short an elapsed time as possible to enhance the remembrance of the nuances and richness of the information read, heard, and gleaned. Once completed, a written document translating the discovery insights into the most dominant themes for a program's design should be prepared. The crafting of this document pushes the interviewing duo to think carefully about how the emergent themes cluster and how they connect to topics most conducive to a structured educational experience. For example a ''financial acumen'' theme, in the context of interviewees' elaborations, might emerge as best being addressed by a program focus on financial statement analysis and a review of generally accepted accounting principles rather than a focus on the merits of debt vs. equity financing. A ''data-driven decision making'' theme might best be translated as warranting a specific day-long marketing or operations computer-based simulation rather than with a statistics tutorial.

This translation document often results in more ideas for classroom focus than calendar constraints permit. The translating phase is not the time to purge the list of instructional themes. Importantly, the translating task provides an internal check on the discovery results – if some of the emergent themes do not appear conducive to an educational setting, additional clarity should be pursued via follow up interviews.

Once the discovery themes have been translated and codified in a document describing the potential array of classroom topics, that document serves as the catalyst for the next phase of the needs analysis – convergence conversations with the client. These conversations should be geared towards determining the relative emphases to place on the topics, given the program's structural constraints. The convergence conversations should push the translation document towards ever-greater specificity and consensus via several iterations of it with the client. The conversations should articulate and tentatively identify each of the planned program's sessions (or session modules). Once finalized with the client, this document, now the product of convergent consensus, is the springboard for pinpointing the instructor talents to recruit for the program delivery team. It is also helpful in guiding each member of that team as they choose materials, refine session foci/objectives, and finalize teaching plans for their part of the program.

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Management training,
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Conducting a learning needs analysis is a rewarding task. Thank goodness . . . it is a critical step in the design of a quality non-degree management education program.

Reference

Clawson, J. and Haskins, M. (2006), *Teaching Management: A Field Guide for Professors, Consultants, and Corporate Trainers*, Cambridge University Press, Cambridge.

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