

DRIVING PERFORMANCE THROUGH ANALYSIS

BY DR ALLISON ROSSETT AND JO LOUDON

Dr Allison Rossett is a Professor Emerita of Educational Technology at San Diego State University. Dr Rossett is a consultant in training and technology-based performance. She is the author or co-author of six books and works on needs analysis, technology-based learning, and engagement.

Jo Loudon interviewed Dr Rossett to learn about the importance of needs analysis.

When did you first become interested in needs analysis?

I was a new professor at San Diego State University and I was teaching instructional design. I started with ADDIE: analysis, design, develop, implement and evaluate. First up: analysis.

Because I was young (29) and green, I looked to the published literature. What a mess! What I found I didn't like. So I interviewed people I considered savvy practitioners and did some serious self-talking on how I assessed needs.

Why is needs analysis important?

In essence, analysis is planning done well, systematically. When we do analysis, we set about partnering with clients and customers to help them define and achieve their goals. Analysis involves reaching out for several perspectives on a problem or opportunity, determining any and all drivers toward or barriers to successful performance, and proposing a solution system based on what is learned, not on what is typically done.

Customers appreciate the clarity and independence that a systematic analysis provides. Century 21 International serves as an example. Some years ago, the real estate corporation sought a major training program for new sales associates. The initial request was for "twenty-one training modules in a variety of media." We focused on what the company really needed, soliciting the perspectives of regional directors, sales experts, brokers, and sales associates. This brought us to a wider and more systemic set of goals than originally conceived by the organisation—and to a very different set of solutions. In addition to goals associated with listing, servicing, finance, and the like, we decided to add a new coaching position across the international organisation, including selection, development and support to assure success for the coach.

I know that you consult and help others with needs analysis, technology-based learning and engagement. Is needs analysis the main focus of your work?

I still do needs analysis, but often my work involves questions of reframing the strategy for a learning organisation or introducing a new position to the talent unit or finding needs and providing development and ongoing coaching for 48 learning staffers across two countries. Recently, I helped an international bank define, communicate with and develop its learning and performance professionals. This work involved data gathering, engagement across an international border, development

of competency expectations and frameworks, and a supportive website.

What are the elements of needs analysis?

My book *First Things Fast* is full of examples and tools. Let me narrow it down like this. Five ideas drive performance analysis:

1. Study prior to action improves the quality of whatever we do.
2. Incorporation of several sources yields a better program than an approach that relies on fewer sources, such as an executive or an expert.
3. Data, broadly defined, is critical to figuring out what to do.
4. A systematic approach to analysis is good for individuals and the organisation.
5. A systemic approach to solutions is good for individuals and the organisation.

Here we want to define data broadly, including, for example, letters of complaint and praise from customers, wait time and response rates, conversations enjoyed in the lunch line, employee opinions solicited via climate surveys, mission statements, elevator chats, interviews with randomly pulled supervisors, certification test results, and focus groups composed of model performers. I examined formal data gathered during performance modelling sessions with financial analysts for a company. What resulted from their group meetings was a picture of their shared goals, skills, and knowledge associated with a top performing financial analyst. Another data source is the priorities of the two executives most concerned about productivity and morale.

It's important to be systematic. When something is systematic, it has defined purpose, components, data, input, transactions, and output. It is standardised, consistent, and repeatable. When systematic, the output from one phase of analysis serves as input for subsequent efforts, enlightening decisions about what to do. In the

financial analysis example above, the early conversations and focus group serve as grist for the more formal press for priorities.

What skills or attributes does a learning and development professional need to conduct a needs analysis?

Curiosity. A keen interest in people. Attention to their context. It helps to ask good questions and to listen and reflect on meanings of answers. It would also be valuable to have skills to use software packages to analyse data and to communicate findings within the learning entity and beyond it.

In your experience is there an aspect of a needs analysis that is often overlooked or misunderstood?

We don't look often enough at what we mean by model or optimal performance. What are we seeking when we attempt to develop supervisors or increase customer focus? In detail, what does it look like? Then there is the issue of causes or drivers of performance. Why is this one or that unit better at customer focus? They've all been "trained" in the past. Why are some applauded, others not so much? Would more training help, as we so often do, or are other factors involved, such as incentives or environmental blocks?

Can you give an example a good analysis and the results?

Jeanne Strayer and I did that real estate program, with statistically significant results published in *Performance Improvement Quarterly* in 1994. New sales associates were the challenge. Fresh from licensing classes and certification tests, many new associates soon became discouraged as they attempted to make sales and failed repeatedly. Not surprising, they often quit, creating problems for themselves and the company. After a systematic analysis, the company broke their training habit in favour of a systemic approach to solving the problem. This approach involved selection of the right

coaches, training for coaches, shared training materials for coaches and new sales people, and monetary incentives for coaches. The simple and typical thing—training modules for the sales associates—would not have made a dent in the numbers. The performance analysis provided the data needed to sell to management the unfamiliar and more complicated, cross-functional system.

What are the links between needs analysis and evaluation?

What we need is more and actionable data, not concern about dichotomous camps dubbed analysis or evaluation. The contention here is that analysis and evaluation are more similar than different, that in many ways they are and should be identified.

For example, you are rolling out a program to elevate attention to and decisions surrounding ethics in your global organisation. The initiative was grounded in reactions to the existing ethics class, interviews with instructors, recorded ethics complaints, outcomes associated with complaints, a review of the literature, interviews with people across the organisation, and an anonymous online survey that asked hard questions about drivers. The resulting program involved a self-assessment, three virtual classroom sessions, a series of podcasts, a phone reporting line, two structured lunch chats for supervisors and their employees, an in-house coach, FAQs online, and a performance support tool to assist in decision-making.

As the program is deployed, data is gathered on satisfaction, use, and recommendations for improvement. The podcasts were judged as too lengthy; within ten days, they were sliced and diced into smaller, targeted bites. A virtual classroom session was added because several questions were raised and the call centre recorded a half dozen inquiries and related reports about the topic. Four new questions and answers were added to the FAQ. The on-boarding process now includes an introduction

to the ethics blend, because this kind of workplace based and multi modal program turned out to be different for employees.

What advice do you have for those who have conducted needs analysis and are having difficulty with leaders listening to the results?

Are they communicating in lean and compelling fashion? Do they know what matters to the leaders? Are they linking what they have learned to what leaders want to know? Are their recommendations actionable?

What do you see as the future for needs analysis?

More needs analysis based on data naturally gathered in organisations via social networks, Twitter, big data and the like. More emphasis on use of associate's perceptions of needs and priorities as they reach for what they want and need at work, in the course of their efforts to do their jobs. Our role will change. We must help them make good decisions, know where the organisation is going, know how we expect their careers to grow and change.

References

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Dr Allison Rossett (@arossett) is a consultant in learning and technology. She is the author or co-author of six books and works on needs analysis, technology-based learning, and engagement. For many years Dr Rossett was a Professor of Educational Technology at San Diego State University. Contact via allisonrossett.com

Jo Loudon (@aitd1) is the Editor and Communications Manager with AITD. Contact via editor@aitd.com.au