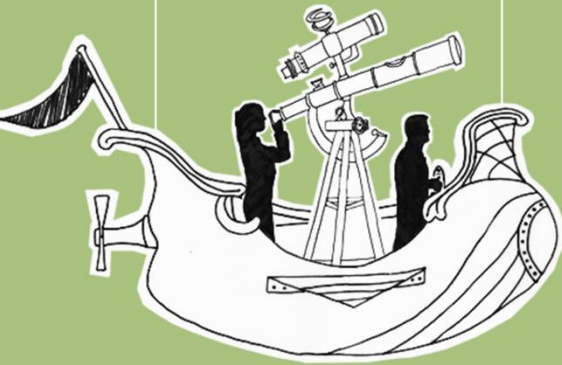




# Training Needs Assessment



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This Training Needs Assessment guides teams through a short diagnostic process: clarify the business need, assess the current and future state, understand the root cause and identify the right mix of interventions.

Use it as a working document during scoping, stakeholder conversations or early learning planning. It can be completed by an L&D lead, change manager, project team or business owner.

## How to use this template

- Complete the sections in order, starting with the business outcome
- Use evidence wherever possible, including performance data, adoption metrics, stakeholder feedback and employee insight
- Treat training as one possible intervention, alongside coaching, communications, process changes, leadership reinforcement and tool improvements
- Review the completed assessment with the relevant sponsor or decision-maker before agreeing actions

## A note before you begin

This template is intended as a starting point rather than a comprehensive assessment. Whilst it can help identify potential capability gaps and intervention options, every organization's context is different.

For complex challenges or business-critical initiatives, a more detailed diagnostic may be needed to fully understand the factors affecting performance and determine the most effective solution. If you'd like support with a full Training Needs Assessment, Change Readiness Assessment or learning strategy, [please get in touch with our experts](#).

## Assessment Overview

|                         |  |
|-------------------------|--|
| <b>Project</b>          |  |
| <b>Function</b>         |  |
| <b>Assessment Owner</b> |  |
| <b>Key Stakeholders</b> |  |
| <b>Assessment Date</b>  |  |

## Define the Business Need

Start by defining the outcome the organization needs to achieve. This helps keep the assessment focused on performance rather than activity.

|                                                                  |  |
|------------------------------------------------------------------|--|
| What business outcome are you trying to achieve?                 |  |
| What problem or opportunity has prompted this assessment?        |  |
| What evidence suggests there is a performance or capability gap? |  |
| What would success look like?                                    |  |
| What are the risks if nothing changes?                           |  |
| Which strategy, program or business priority does this support?  |  |

## Evidence Checklist

Tick the evidence sources that support the need for intervention.

- |                                                 |                                                     |
|-------------------------------------------------|-----------------------------------------------------|
| <input type="checkbox"/> Performance metrics    | <input type="checkbox"/> Audit findings             |
| <input type="checkbox"/> Adoption data          | <input type="checkbox"/> Operational KPIs           |
| <input type="checkbox"/> Employee feedback      | <input type="checkbox"/> Incident data              |
| <input type="checkbox"/> Customer feedback      | <input type="checkbox"/> Process data               |
| <input type="checkbox"/> Survey results         | <input type="checkbox"/> Existing training feedback |
| <input type="checkbox"/> Direct observations    | <input type="checkbox"/> Other                      |
| <input type="checkbox"/> Stakeholder interviews |                                                     |

## Consider the Assessment Level

Before assessing current and future state, consider where the capability gap exists. A performance issue may originate at one or more levels.

Consider whether the issue is primarily driven by organizational factors (strategy, structure, culture, workforce capability), team or operational factors (processes, ways of working, KPIs), or individual factors (knowledge, skills, confidence and behaviors). Often the root cause spans more than one level.

| Assessment Level   | Key Observation |
|--------------------|-----------------|
| Organizational     |                 |
| Team / Operational |                 |
| Individual         |                 |

## Assess the Current & Future State

Use this section to compare what is happening now with what needs to happen in the future. Be specific and evidence-based. Focus on observable differences in performance, behaviors, ways of working and business outcomes rather than general statements.

| Area              | Current State | Future State |
|-------------------|---------------|--------------|
| Performance level |               |              |
| Ways of working   |               |              |
| Behaviors         |               |              |
| Capability level  |               |              |
| Tools or systems  |               |              |
| Business impact   |               |              |

## Identify Affected Audiences

Map the groups affected by the change, performance gap or capability requirement. For the impact of change section, consider how each group will be affected, including changes to responsibilities, processes, systems, behaviors or performance expectations.

| Audience / Role | No. of People | Impact of Change | Current Capability | Required Capability |
|-----------------|---------------|------------------|--------------------|---------------------|
|                 |               |                  |                    |                     |
|                 |               |                  |                    |                     |
|                 |               |                  |                    |                     |
|                 |               |                  |                    |                     |
|                 |               |                  |                    |                     |
|                 |               |                  |                    |                     |
|                 |               |                  |                    |                     |

## Capability Gap Assessment

Rate current and required capability using a 1–5 scale, where 1 = low and 5 = high. Calculate the gap by comparing the current and required scores.

Complete this assessment for each identified audience group where capability requirements differ. If multiple groups share similar capability needs, they may be assessed together.

| Capability Area           | Current (1-5) | Required (1-5) | Gap (Current - Required) |
|---------------------------|---------------|----------------|--------------------------|
| Role or process knowledge |               |                |                          |
| Technical skills          |               |                |                          |
| System or tool use        |               |                |                          |
| Digital literacy          |               |                |                          |
| AI capability             |               |                |                          |
| Confidence                |               |                |                          |
| Leadership capability     |               |                |                          |
| Change readiness          |               |                |                          |
| Stakeholder engagement    |               |                |                          |

Larger gaps indicate areas where additional development, support or intervention may be needed. Focus first on capability areas with the largest gaps and the greatest impact on business performance.

## Root Cause Assessment

A capability gap is not always a training issue. Use this section to identify what is actually limiting performance.

| Potential Cause                   | Limiting Performance     | Comments |
|-----------------------------------|--------------------------|----------|
| Lack of knowledge                 | <input type="checkbox"/> |          |
| Lack of skills                    | <input type="checkbox"/> |          |
| Lack of confidence                | <input type="checkbox"/> |          |
| Unclear expectations              | <input type="checkbox"/> |          |
| Ineffective process               | <input type="checkbox"/> |          |
| Lack of leadership support        | <input type="checkbox"/> |          |
| Poor communication or awareness   | <input type="checkbox"/> |          |
| System or tool issues             | <input type="checkbox"/> |          |
| Resistance to change              | <input type="checkbox"/> |          |
| Organizational environment        | <input type="checkbox"/> |          |
| Performance measures & incentives | <input type="checkbox"/> |          |

## Primary Root Cause

Summarize the primary factor limiting performance, supported by the evidence gathered during the assessment.

|                           |  |
|---------------------------|--|
| <b>Primary Root Cause</b> |  |
|---------------------------|--|

## Stakeholder Interview Guide

Use these prompts with leaders and employees to build a fuller view of the gap.

### Leadership Questions

- What business outcomes are most important to achieve?
- What evidence suggests there is a performance issue?
- What does good performance look like?
- What is stopping teams from working in the desired way?
- What support or reinforcement is currently in place?
- How should success be measured?
- What evidence suggests people are ready and willing to adopt the required changes?

### Employee Questions

- Which parts of the role or process are most challenging?
- What knowledge or skills would help you perform more effectively?
- What gets in the way of achieving the desired outcome?
- What support would be most useful?
- Have previous training or support activities helped?
- How confident do you feel performing the required behaviors?

## Determine the Right Intervention

Select the intervention or combination of interventions that best addresses the root cause. Training may be required, but it should not be assumed.

| Gap Identified | Root Cause | Recommended Intervention | Owner | Priority |
|----------------|------------|--------------------------|-------|----------|
|                |            |                          |       |          |
|                |            |                          |       |          |
|                |            |                          |       |          |
|                |            |                          |       |          |
|                |            |                          |       |          |
|                |            |                          |       |          |

## Intervention Options Examples

The following are examples of possible interventions. Select all that apply.

- ☐ Training
- ☐ Coaching
- ☐ Mentoring
- ☐ Job aids

- ☐ Knowledge sharing
- ☐ Process redesign
- ☐ Communications
- ☐ Leadership engagement

- ☐ Community of practice
- ☐ Change management support
- ☐ System improvement
- ☐ Other

## Success Measures & Review

Define how the impact of the agreed intervention will be measured. Focus on outcomes rather than attendance or completion alone.

| Measure         | Current Baseline | Target / Desired State | Review Date |
|-----------------|------------------|------------------------|-------------|
| Adoption        |                  |                        |             |
| Productivity    |                  |                        |             |
| Quality         |                  |                        |             |
| Confidence      |                  |                        |             |
| Behavior change |                  |                        |             |

## Assessment Summary

|                           |  |
|---------------------------|--|
| Key Capability Gaps       |  |
| Primary Root Cause        |  |
| Recommended Interventions |  |
| Priority Actions          |  |
| Expected Business Outcome |  |
| Success Measures          |  |

## Need additional support?

Completing a Training Needs Assessment is only the first step. The real value comes from translating findings into practical actions that improve performance and deliver business outcomes.

If you need support with a bespoke assessment, prioritizing interventions, developing a learning strategy or delivering wider change and adoption support, [get in touch with our team](#).