

**TRAINING &  
DEVELOPMENT  
TOOLKIT**

## **ABOUT THIS TOOLKIT**

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The development of people's performance in the workplace is critical to the success of your organisation. The Training & Development (T&D) process has the potential to make a strong positive impact on the performance of individuals, teams and the business as a whole.

This toolkit is designed as a step-by-step aid to Training and Development Practitioners and anyone with responsibility for training within organisations. It will support you in developing and implementing successful Training Policies & Procedures which are aligned with the Business Strategy and Objectives.

The steps and stages in the Training & Development process are outlined along with practical tips and tools for you to use when implementing in your organisation. If you follow the stages outlined and complete the suggested exercises\*, you will have in place all the foundations for a successful Training & Development Strategy and Plan for your business.

\* All indicated by the icon



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## **TRAINING & DEVELOPMENT**

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In order to convincingly advocate the benefits of training to the management & staff of your company, it is essential that they understand the positive role that it can play in improving organisational performance. Ensuring good performance of individuals and teams is central to the work of the Training & Development function. In order to do this a planned approach is necessary. The activities of the Training & Development function must be closely linked to the overall business plan.

The impact T&D activity is meant to have on performance must be clearly defined and will be communicated. To be successful T&D activities must be supported by wider T&D Policies and Procedures.

**Training Vs Development:** Training needs should be based on immediate needs for changes in behaviour. The long range development goals should be based on the acquisition of knowledge and skills to be used in the present as well as in the future. Development looks down the road, and addresses helping people meet challenges, create change and ensure the success of the organisation in the future.

## **WHY TRAIN?**

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To ensure that the training initiative you embark upon makes a real impact, brainstorm your team's ideas on the impact of training under these 3 headings.

1. Saving Time
2. Saving Money
3. Saving Effort

It is important that the training manager is clear about the answers to these questions and is open to any other possible benefits which the team might suggest. These responses should help shape the design of any subsequent training interventions and send out a message to management and employees that investment in training can result in real and tangible benefits to all stakeholders. The following are a number of such benefits which can emerge from effective training:-

### **Benefits to the Company:**

- 1 Increased productivity and profitability.
- 2 Raised standards of performance.
- 3 Expansion of the business.
- 4 Increased cash turnover.
- 5 Maximisation of resources/greater efficiency.
- 6 Reduced waste.

- 7 Reduction in complaints.
- 8 Helps recruitment.
- 9 Lowers staff turnover.
- 10 Aids succession planning.

**Benefits to Staff:**

- 1 Shared work load.
- 2 Better team work.
- 3 Reduced overload.
- 4 Increased job satisfaction.
- 5 Better morale.
- 6 Greater professional and personal development.

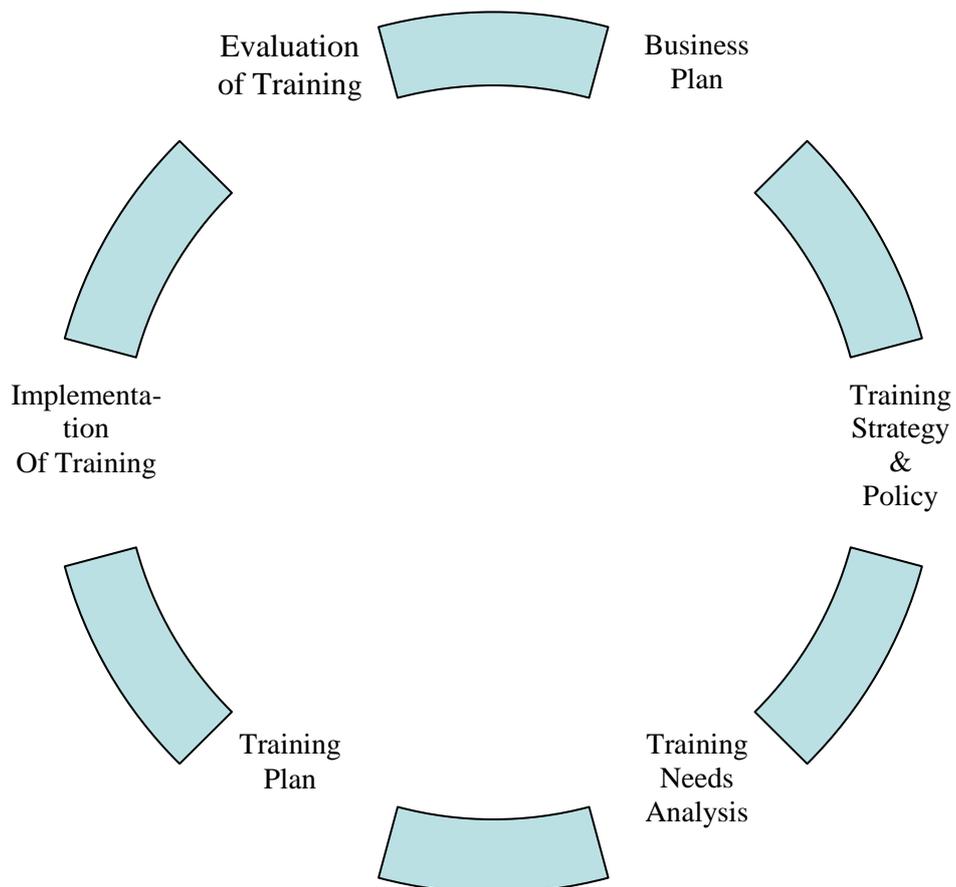
**Benefits to Customer:-**

- 1 They know what to expect
- 2 Clearer brand association
- 3 More efficient, reliable service.
- 4 Less cause for complaint

**STAGES IN THE TRAINING & DEVELOPMENT PROCESS:**

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The following is the sequence of steps towards achieving a training system which can meet the needs of your company.



## **ESTABLISH THE BUSINESS PLAN**

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The Mission Statement represents the compass of the Company at the strategic level. It provides direction and clarity on where the team or company should be going and what is important on the journey. It outlines the business aims, who the customers are, what their products and services are and what distinguishes their business from competitors. The "Business Plan" of a company is essentially an amalgamation of all plans from each department, or section (depending on the organisational structure). These plans should span all areas of the operation from production, to purchasing, marketing, subscriptions, finance and so forth. The training department must be fully conversant with these plans in order that it can subsequently produce a training plan which will facilitate their attainment. Close liaison in planning with managers responsible for those respective areas is essential.

## **ESTABLISH A TRAINING & DEVELOPMENT STRATEGY & POLICY**

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A training strategy is an outline of how you propose to achieve what you have decided and is central to the success of the training function within your organisation. It must take into account the calibre of the particular organisation as well as the external environment in which the company operates. The three components of training strategies are as follows:-

- 1 The T&D Mission.
- 2 The T&D Objectives/Goals.
- 3 The T&D Policy Procedures.

Examples of these are as follows:-

### **- T&D Mission**

This should summarise what the training department is about, as well as what direction it is going in and, most importantly, it should reflect the corporate mission statement. It should include the higher goals of the department and unlike training objectives, the mission cannot be measured.

### **Sample T&D Mission Statement:-**

"The training department will provide a comprehensive range of training programmes to all staff aimed specifically to meet their needs and to develop their knowledge and skills in core areas, in order to achieve the business mission".



Write your organisation's training Mission Statement below.

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- **T&D Objectives/Goals**

Once the mission statement has been agreed, the training objectives should specifically help the organisation to meet its corporate objectives. These are measurable goals outlining the aims of the department and outlining how the mission will be achieved.

**Sample T&D Objective:-**

“To ensure all managers are trained in the skills of conducting appraisals so that the new system of performance appraisal can be introduced within the next six months”.



Write your T&D objectives below.

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- **T&D Policy & Procedures**

T&D Policy & Procedures would typically include the following:

- Policy Overview
- Responsibilities for T&D
- \*T&D Resources
- Overview of your T&D System
- Training Needs Analysis
  - How it is conducted and by whom
- Training Plans
  - How and by whom
- Training Implementation
  - Issues and procedures
- Training Records
- Training Evaluation & Review
- T&D Process for an individual member of staff

\* The total spend per annum for the T&D function should be broken down into spend per employee, or number of training days per annum allocated to each employee. (A recent IBEC survey showed that Irish companies allocate 3.5 to 5 days per annum per employee.)

A sample training procedure is described below.

“All training will be focused on current and future business needs. Staff and their line managers will drive training programmes. A comprehensive training needs

analysis will be undertaken before any training begins. All training programmes will be evaluated systematically. The training policy within the organisation will be regularly reviewed to ensure it is in line with the company's overall objectives".



Develop your organisation's T&D Policy & Procedures. A tool to assist you in developing these can be found in *Appendix 1*.

### **SWOT ANALYSIS OF T& D ENVIRONMENT**

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It is essential that the training environment itself be evaluated to ensure that it is ready to facilitate the delivery of the various aspirations, objectives and goals as outlined in the Mission Statement and business plans. A "SWOT" analysis is advocated as a tool which can be used in this analysis. Consider the following;

- Strengths
- Weaknesses
- Opportunities
- Threats



Carry out a SWOT analysis of your training environment.

Strengths

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Weaknesses

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Opportunities

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Threats

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Having completed this exercise, review your training mission and policy statements as well as your objectives for the training department. When devising the current strategy, focus on where it is you want to be and ask the following questions based on your SWOT analysis.

- 1 What new factors need to be considered during the forthcoming year?
- 2 What does the training department need to change in its current strategy?
- 3 What actions need to be taken to implement current strategies.

### **TRAINING & DEVELOPMENT NEEDS ANALYSIS**

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The fundamental principles governing every Training Needs Analysis are.

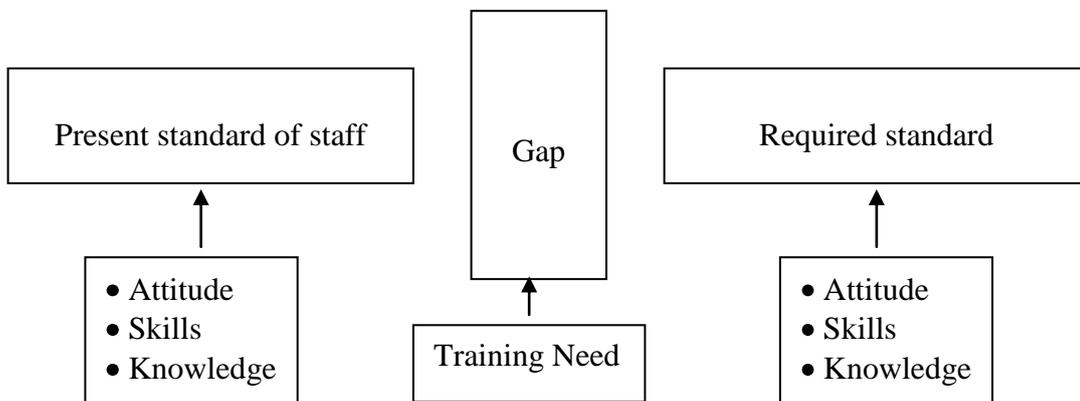
- Evaluating what we are doing now
- Comparing this to what we aim to do in the future
- Analysis of the reasons for the performance gap
- Identifying the types of training interventions, which might bridge the gap.

Training needs can be viewed on two levels:

1. Organisational Needs
2. Individual Needs

A training need is usually viewed as the gap between where the person or organisation is now and where they want to be. This is usually viewed on three distinct levels:

- A knowledge gap
- A skills gap
- An attitudinal gap





A tool to assist in the identification of T&D needs can be found in *Appendix 2*. This series of questions will help identify the main organisational training needs. Involve as many people as you can in the process.

Be aware that managers often identify a problem as a training need, when in fact it is another issue e.g. Job design, resource issue, management issue etc. To decide if training is the answer, one basic question needs to be asked: "does the employee or group of employees, know how to meet the required performance standards for the task?" If the answer is "Yes" then other actions besides training are needed.

### **Tools & Methods for Identifying Training Needs**

Training needs are identified in a systematic manner. The following methods are useful.

<b>TOOL</b>	<b>O/I</b>
Training review Meetings	O
Discussed at Management Meetings	O/I
Training Plans for all areas	O/I
Customer Feedback Analysis	O/I
Observation of deviations from standards	O/I
Review of Training Records	O/I
Exit Interview Reports	O
Audit Reports – Internal & External	O
Mystery Shopper Reports	O/I
New technology / equipment / products	O
Performance Appraisals	O/I
Business Plan – Future Needs	O
Career Development Plans	O/I
Competitor Analysis	O
*Brainstorming & Meta Planning	O/I
*Thomas International Tool	I
*"Snaking"	O/I

O= Organisational T&D Need

I = Individual T&D Need

\* These tools are explained in the following pages.



## **"SNAKING"**

You might like to consider a method called 'SNAKING' which has been taken from a guide developed by Scottish Enterprise: *"People in Tourism- A Guide to Recruitment and Staff Development."*

This exercise is called 'Snaking', for reasons which will become obvious. It has been found to be of considerable use in a side-by-side situation with an employee, where you "go snaking together". If you run group sessions, why not "go snaking" as a group?

### **Look at the sample below**

Down the left-hand side, are the tasks, skills and knowledge required for the post (in this case a receptionist).

An 'x' has been placed in the appropriate box opposite each. Here is the scoring system:

- 4** = *this task/skill is essential;*
- 3** = *this task/skill is important;*
- 2** = *this task/skill is of limited importance;*
- 1** = *this task is very rarely required.*

In the employee column, a similar scoring system has been applied: only, in this case, we have used the numbers to describe the skills the employee has:

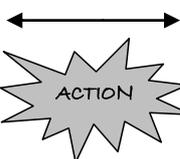
- 4** = *the employee is highly skilled in this area;*
- 3** = *the employee has above average ability;*
- 2** = *the employee has average ability;*
- 1** = *the employee has only limited ability.*

Having entered the crosses ("x"), now join them up (as shown) – thus creating two "snakes". As the two snakes slide down the page, their bodies sometimes run parallel to each other, sometimes they are wide apart.

Where they are wide apart, you have a possible training need. This is because you have identified that the skill/knowledge in question is essential for the job, while the employee's skill/knowledge level is limited.

**Sample – Receptionist (John)** – Write down the skills/knowledge associated with the post. Using the scoring system below fill in the post and employee columns using “xs”. Join these together in each column.

Tasks/skills knowledge required by the job or the business	Job Post				John			
	4	3	2	1	4	3	2	1
Operate switchboard								
Answer incoming calls								
Take messages								
Give information								
Take bookings								
Make outgoing calls								
Sort mail								
Frank outgoing mail								
Answer enquiries								
Handle complaints								
Amend bookings								
Type correspondence								
Greet customers								
Oversee registrations								
Prepare bills								
Accept payments								
Provide receipts								
Meet daily schedules								
Prioritise work								



= Training Need

Would “SNAKING” be of benefit to your organisation. If so put plans in place to implement the process.

## **The Thomas International System**

The Thomas International System is comprised of a Job analysis questionnaire (HJA) which is completed by both the job holder and his/her manager jointly to assess the demands of the job. The personality profile is then completed by the job holder to assess strengths and weaknesses. This is then compared with the requirements of the job and the resulting training needs identified. A computer programme is used to assess these needs based on the information inputted into the computer.

### **HJA**

Complete the Human Job Analysis attached to establish the job requirements. This should be completed by the manager in the area or another person with an understanding of the requirements of the job under review.

### **PPA**

The job holder should complete the PPA attached carefully following the instructions outlined at the start. This will give the personality profile of the individual which can then be compared to the requirements of the particular job.

### **Training Needs**

Having completed both of the above questionnaires, this information should be sent to IBEC for analysis using the Thomas International System. The results will provide the job holder with a detailed analysis of their personality and consequent training needs. In this way the information provided gives the job holder specific guidance as to his/her particular training needs.

If you would like to find out more:

This system is available for purchase from the Training Unit in IBEC -

Contact Jenny Hayes                      Ph 01 6051613.  
    Fx 01 6381613  
    Email jenny.hayes @ibec.ie

## **Training Needs Analysis - Brainstorming and Meta planning**

A sample group should be selected to identify the training needs required within a department, team or company.

This diagnostic uses two techniques - the first is brainstorming which involves staff putting forward their ideas regarding the skills and knowledge that they think are appropriate and required.

The second technique is called meta planning and this is used to allow the staff group to select and prioritise their training needs.

## **Brainstorming**

Brainstorming is a creative process used to assemble a variety of ideas on a topic on a totally non-judgmental basis. It is designed to stimulate all kinds of ideas about the topic under consideration. In this process, no comments or discussion should take place around any of the ideas raised. There should be no evaluation or assessment of any proposal suggestion.

The main stages in brainstorming are....

- Clarify the issue to be addressed
- Generate ideas
- Categorise classify and prioritise

At the beginning of the process the Facilitator will explain the ground rules of brainstorming and then invite the members to participate in accordance with the rules of Brainstorming which include no evaluation or criticism. Each person's contribution will be written on the flipchart. The ideas generated in this session then need to be categorised into skills and knowledge ensuring all understand the attributes suggested before moving to the next stage.

## **Meta Planning Stage**

Having undertaken the initial brainstorming to establish the skills and knowledge appropriate or necessary for the team or department, the members now need to decide which of these need to be developed in their own group. To select and prioritise their training needs the group will use a technique called meta planning.

The facilitator will take the group through a discussion of the attributes which emerged from the brainstorming and review. This discussion should take into account the needs of the group as a whole and should allow participants to begin to arrange priorities for training.

At the end of the meta planning session, the group will have identified their own shortfall in the skills and knowledge necessary and will have identified and prioritised appropriate training to address the shortfall. This process needs to be carefully led to ensure no vital areas are omitted.

## **The meta planning technique**

1. All the skills and knowledge areas identified for the team /department in the course of the brainstorming and review will have been listed on flipcharts in the course of the identification of training needs and categorised into skills and knowledge.
2. The group will have agreed which of the attributes are in deficit in the group and these will have been listed on the flipchart as the training needs.
3. All participants are then given four post- it notes and are invited to write on each of these a particular skill or knowledge area from the final training needs list that he/she believes should be part of the priority training programme. At a minimum each participant should ensure that at least one knowledge and one skill attribute is included in the four topics. The facilitator needs to remind

participants of the vital elements of the job to ensure a biased agenda does not result.

4. The completed 'post - its' notes should be handed to the facilitator who will attach them to the appropriate training needs listings on the flipcharts. The topics with the greatest support will form the training programme and the degrees of support should indicate the desired order in which they are to undertaken.
5. This process can help in the identification and design on the training needs of a department or team towards their vision. Through this process of involvement, it ensures maximum buy in from staff as their ideas have been included in the formulation of the training plan and the way forward.

### **How do I measure up?**

In carrying out a training needs analysis of your staff you will begin to identify "gaps" which are preventing your staff from carrying out their tasks effectively. These gaps may be due to insufficient training and development but could also be as a result of a breakdown in internal communications within the organisation.

Whatever the reasons you must **act on them**. If training is required, identify how you are going to provide it. If the person does not have the essential skills or knowledge to carry out the job, consider whether they should be moved to another position. If there are barriers in your internal communications which are preventing a member of staff from carrying out their job, then identify how you will remove those barriers.

### **DRAWING UP THE TRAINING & DEVELOPMENT PLAN**

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For a T&D plan to be effective there must be:

- Allocation of specific responsibilities for drawing up and implementing plans
- A clear link to the business plan and the identified training needs
- A process to ensure operational managers and T&D personnel work together to agree outcomes and how these will be evaluated
- The plan must be integrated with Training Policies and Procedures

For every planned training intervention the following should be outlined:

- Why the training intervention is needed and what the intended outcomes are for both the participants and the organisation
- The staff who it is intended for
- The learning objectives, content, method of delivery and who is responsibility for the design, organising and delivery
- Costs and resource implications
- When and where the training will take place
- How and when the intervention will be evaluated



When looking at the area of training and development, the approach outlined in *Appendix 4* may be useful when considering the stages involved in any Training and Development Plan.

### **IMPLEMENTATION OF TRAINING**

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Some issues for consideration here are:

- How are company policies, procedures and standards are documented. How does training content reflect these.
- Who carries out training – operational and other – how are trainer skills developed in these people and how are they supported.
- Where external trainers are used, how are their training abilities assessed.
- Where is training carried out
- How are trainees briefed before and after training interventions
- How is the work of trainees covered during training
- How are expenses dealt with for off site training
- Who is responsible for setting up training facilities and equipment
- How training is recorded – this can be manually or via a software package



Identify below issues for your company in implementing training:

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### **EVALUATION OF TRAINING**

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For training to be successful it must have an impact at several levels. It is good practice to decide before the training, what this impact should be and how it will be evaluated that the impact has been achieved.

According to the Kirkpatrick model there are four levels at which training should be evaluated:

- Level One: Evaluating Reaction
- Level Two: Evaluating Learning
- Level Three: Evaluating Behaviour
- Level Four: Evaluating Results

**Level One: Reaction.**

Evaluation at this level seeks to determine the reaction of the participants. It is often measured by way of attitudinal questionnaires completed at the end of the training intervention. Samples of two such questionnaires are contained in *Appendix 5*. As a general rule of thumb, you should expect at least an 80% satisfaction rating at the end of a training intervention.

**Level Two: Learning**

Evaluation at this level attempts to find out if training has resulted in a change in attitudes, improvement in knowledge or increase in skill. This is usually done by conducting post-training testing. This must be combined with pre-training testing in order to conclude what was actually learned as a result of training.

If trainees do not use the learning soon after the intervention it is estimated that upwards of 95% of the learning will be forgotten.

**Level Three: Behaviour.**

This evaluation involves testing the participants capabilities to perform learned skills back on the job. It can be done formally by way of tests or informally by observation. Unlike reaction and learning where the evaluation should be done immediately, evaluation to ascertain a change in behaviour involves making decisions about when to evaluate and how often and how the evaluation should be conducted.

Outlined below is a sample questionnaire to determine the extent to which those who participated in a training programme on leadership methods have applied the principles and techniques they learned to their job.

Please circle the appropriate response after each question.

- 5 = Much more
- 4 = Some more
- 3 = The same
- 2 = Some less
- 1 = Much less

Time/Energy spent after training compared to before Training:

Getting to know my employees	5	4	3	2	1
Listening to subordinates	5	4	3	2	1
Praising good work	5	4	3	2	1
Talking to employees about personal interests/families	5	4	3	2	1
Asking subordinates about their ideas	5	4	3	2	1
Managing by walking around	5	4	3	2	1
Taking new employees on a tour of the department and other facilities	5	4	3	2	1
Introducing new employees to their co-workers	5	4	3	2	1
Tactfully correcting mistakes and making suggestions	5	4	3	2	1

*Source: Kirkpatrick 1998*

**Level Four: Results**

This level attempts to gauge the overall effectiveness of the training event by assessing the impact on the wider organisation in areas such as monetary impact, effect on efficiency, impact on teamwork. This is the ultimate measure of the success of the training intervention.

A combination of evaluation methods will give a more comprehensive review of the training carried out. Based on this feedback, future training needs can be established in a systematic and planned way as well as recording the successes attributable to the training process.



Look back over your training plan and decide how each training intervention will be evaluated on levels 1-4.

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**APPENDIX 1: T&D POLICIES & PROCEDURES TOOL:**

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Consider the following when developing your T&D Policies & Procedures:

*Note: Assistance in answering many of these questions is given on the toolkit.*

What is the company's policy on T&D?

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Who is responsible for T&D?

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How does the T&D system work?

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How are training needs identified?

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How are training plans Devised?

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How do people apply for training programmes?

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How will training be delivered?

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What are the resource implications and how will these be handled?

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How is training recorded?

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How is training Evaluated & Reviewed?

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**APPENDIX 2: T&D NEEDS ANALYSIS TOOL 1**

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**Complete the following 5 Key questions...**

**1. Mission**

What are your organisation's goals?  
What is your vision/mission statement?  
Which part of your mission statement is most/least credible to your employees? What difficulties face you in the marketplace?  
Does staff training affect your ability to recruit staff?

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**2. Objectives**

What is your actual performance?  
How are you doing at the moment?  
What measures will you use to see if goals are achieved?  
What are the forces outside your control that will make achieving these goals challenging? (changes in the environment, economy or government regulations)  
What are the forces outside your control that will make the accomplishment of these goals easier?  
What forces within your control will help in accomplishing these goals?  
Did staff play a role in evaluating how you are doing now?  
What feedback did you get from customers?

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**3. Culture**

Do you have a culture which promotes the achievement of your targets?  
Which behaviours are rewarded within the organisation?  
Which behaviours are punished within the organisation?  
Is your organisation chart as flat as we want it to be?

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**4. Processes**

Do you have the right systems in place to help you achieve your goals?  
Which parts of your systems, processes are most frustrating for customers/staff?  
What would your customers say is the least effective part of what you do for them?  
In which areas are your competitors out performing you?

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**5. Key skills, knowledge, attitude**

Analyse and take action.

What are the reasons for the performance gap?

Is it a training issue?

What are the skills, knowledge and attitudes needed?

What kind of training and development will deal with this gap?

Given our stated aims, what must people do differently in the future?

How do our key employees match up to the competition in terms of knowledge, skill and attitude?

What are the most frequent complaints about employees 'behaviour?

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**APPENDIX 3: T&D NEEDS ANALYSIS TOOL 2**

Answer the following questions when drawing up your training needs analysis...

**External Analysis**

What are your customer's expectations of you?

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Is there any new legislation, which will affect the way you do business?

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What are the difficulties facing your organisation in the marketplace?

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Will staff need training to deal with new equipment or services?

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How does training have an impact on these external factors?

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How involved in training are your competitors?

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Does your staff training policy affect your ability to recruit new employees?

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What feedback/comments have you recorded from customers?

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**Internal Analysis**

Complete the following analysis for your own organisation...  
What are the total workforce and how much work in each department?  
How well does each department function?

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What have managers observed in terms of the behaviour of their staff?

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What is happening in your organisation that might be a trigger for a Training Needs Analysis. Consider the following...

- Internal promotions/transfers
- New procedures/ systems
- New standards
- New products
- New customers/equipment
- Appraisals
- Requests from managers
- Review of previous training plans

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Consider also any negative indicators in your organisation including the following..

Customer complaints

Accident records

Increasing number of grievances/disciplinary situations

High staff turnover

Loss of customers

Disputes

Standards not being met

**APPENDIX 4: TRAINING & DEVELOPMENT PLAN TOOL**

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Complete the following questionnaire to develop your training plan...

1. Identify the business needs for the programme

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Identify the Dept/Team needs for the programme

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Identify the individual needs for the programme

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2. Identify what will be delivered in terms of objectives - State your learning objectives behaviourally - able to do at the end of the programme.

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3. Identify the main content areas to be covered and prioritise

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4. Identify how the programme will be delivered in terms of learning/training methods to ensure greatest transfer of learning back on the job

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5. Outline the resources needed including estimates of overall costs - On/off the job costs/ supports needed

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6. Who will deliver the programme?

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Who will be responsible for running the programme and the evaluation internally?

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7. Who will receive the programme?

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8. Identify when the programme will be delivered

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Where will the course take place and what facilities are needed?

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9. Identify how the programme will be evaluated

Reaction  
Learning  
Behavioural change  
Impact on the team / organisation

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10. Identify any other factors which need to be taken into account in your training plan.

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**APPENDIX 5: SAMPLE LEVEL 1 EVALUATION FORMS:**

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SAMPLE 1: EVALUATION FORM

1 *Your overall assessment of the programme*

*Excellent*  *Very good*  *Satisfactory*  *Poor*

2. *General standard of presentations and materials*

*Excellent*  *Very good*  *Satisfactory*  *Poor*

3 *To what extent did the programme meet your needs?*

*Not at all*  *Partially*  *Completely*

4 *Which sessions were of most value to you?*

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5 *Which sessions were of least value to you?*

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6 *Any additional comments:*

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*Name (Optional):* \_\_\_\_\_

*Thank you for your co-operation*



6 What sessions or topics were of least value to you?

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7 Was there anything specific about the programme that:

(a) prevented you from deriving maximum benefit from it?

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(b) enabled you to derive maximum benefit from it?

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8 Any other comments you wish to make in relation to any aspect of the course.

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Thank you.