

How do you decide what development you and your people need?



Contents

3 Introduction

4 Getting value for money

5 Getting started

5 Spotting the needs

8 Making it happen:

8 Stage 1 – Communication

14 Stage 2 – Information gathering

24 Stage 3 – Analysis

26 Stage 4 – Prioritising, planning and preparing for action

28 Summary

29 Glossary

To help you use this workbook for the benefit of your business we have provided exemplar proformas for you to adapt and use. You will find these throughout this workbook.

You will also find a glossary to help you with any terms which may be unclear or unfamiliar to you.

Introduction

No business, however large or small, can succeed without people. They are its customers and its suppliers and, most importantly, they are the business itself. People are the most important asset of any business.

This workbook, the first in a five part series, will help you think about how you sort out what development you really need for the people who make up your business:

- how you communicate with your people
- how you recognise your people's short term development needs
- how you recognise your people's medium term development needs
- how you recognise your people's long term development needs
- how you analyse the information you collect
- how you prioritise, plan and prepare to take action based on this analysis.

It will also help you to review your approach to securing your business's sustainable future through the efforts of your people.

This workbook is a tool for you to use, read, write in, copy parts, and adapt and use the templates. You may wish to discuss aspects with external advisers from learndirect scotland for business, the learning centre network, your local enterprise company or trade/training association.

Throughout this workbook, and the series, we will be talking about learning and development. When properly managed it is the key to business success.

Learning and development happens in many ways. Some are listed below:

- on the job in both structured and often unstructured ways
- through coaching and mentoring
- through planned job rotation and secondments
- through guided reading
- through networking and exposure to customers, suppliers and professional bodies
- through participation in events outside the workplace
- through online learning
- through pursuit of formal qualifications
- through project-based and problem-based learning.

Learning and development should be a planned, managed and valued activity that impacts positively on the performance of your business.

To realise the benefits you need to:

- recognise your people's needs
- be able to analyse these needs
- be able to prioritise and plan how to meet these needs
- be able to keep your people involved and informed
- involve representative groups, where they exist, at every stage.

Using the workbook will help you review your current practices and approaches and help you develop them further.

Getting value for money

As a small or medium sized enterprise (SME) you will be aware of your business' costs. Value for money and return on investment (ROI) are concepts critical to long term business success.

When it comes to your investment in yourself and your people there are some fundamental questions that need to be answered to help you ensure that the business will benefit from any learning interventions.

- **Why** are you considering this?
- **What** difference will it make?
- **Who** will benefit most from exposure/participation?
- **When** should they realistically participate?
- **How** will you ensure that the business gets the benefit of this proposed activity?

It is important to remember that any learning and development activity is a means to an end and not an end in itself. The process depends upon you being clear about what you want to achieve and how this will contribute to realising your business's goals and targets. Value for money will then follow.

As an SME you will have a clear idea of what your business aims to achieve this year and even over the next three to five years. This may be written down as a formal business and/or operational plan. This is your reference point for the business.

To help you realise your business objectives it is sound practice to assess the capability of your people. This will help you to identify areas where training interventions may be necessary to create the capacity you need in your team.

You need to understand the profile of your workforce:

- age
- skills and knowledge levels
- attitude
- behaviours
- retention rate.

You need to understand how your people prefer to learn and how to allocate time and resources to get the best results for everyone. Progressing through this workbook will help you to do just that.

The key steps are:

- understanding your business and its environment
- understanding the capacity you will need to enable your people to help you compete
- understanding your people, their needs and abilities
- identifying gaps within the business
- identifying opportunities for business development
- analysing the information gathered
- prioritising and planning how to meet the emergent needs
- maintaining the momentum
- realising the business benefit
- keeping everyone involved and informed.

Getting started

It is tempting to think that people know what they need and know how they want to learn, and that all you have to do is ask them. This approach, whilst not uncommon in business, is not likely to get you the focused, dynamic business results most sustainable SMEs desire.

More effective by far is establishing:

- the knowledge, skills and attitudes you need and expect from all your people if they are to effectively fulfil their current and future job roles
- the performance gaps between the current situation and the business' real needs
- the best ways to address the gap for the individual or team in question.

How you recruit, select and promote your people is likely to be based round these same criteria. As you can see nothing stands alone.

Spotting the needs

An effective SME does not leave to chance the process of identifying its people's learning and development needs. It has a structured and disciplined approach.

This will include how you:

- induct people new to the company and/or new to the job to equip them for the demands of their role
- introduce your people to new products, new materials, new plant and new processes
- ensure legal compliance amongst your people
- conduct regular performance reviews for all your people
- monitor your business environment and identify new business opportunities
- review relationships and developments with key customers and suppliers
- work with quality assurance systems such as ISO 9001:2000
- work with continuous improvement tools such as the Excellence Model and Investors in People
- involve your people in business reviews and the improvement process
- monitor your workplace profile to maintain the capacity and capability you need for your business to remain sustainable, competitive and able to meet its business objectives.

Case study

Everyone knew that it was a rotten job! The pay was basic and the staff turnover was through the roof. As the boss said, **“If half of each new intake stay for more than four weeks then I’m doing well. It costs a lot, but I just have to work it into my bottom line. That’s just how things are in this industry”**. He couldn’t have been more wrong.

His people had another story to tell. The words of one were typical, **“Fish filleting may be a cold, wet and demanding job. It can be dangerous too, but if we’re treated as though we’re brainless from the minute we arrive and given no idea when we’ll be trained to do different things, then we are left believing that all we’ll ever do is hose down the fish and clean up entrails. It’s no wonder that people leave just as soon as they can. All we seem to do is start off new people every week with little expectation that they’ll stay. It’s really demoralising.”**

The boss then attended a fish processors’ seminar. Chatting to colleagues over a pint he was shocked to hear of the success of some of his competitors and how easy they found it to recruit and keep people. It made him come back and look with fresh eyes at what was happening with his own fifty staff.

He began to recognise:

- low expectations amongst his people
- minimal induction practices
- poor supervision
- rigid roles on the production line
- little willingness to be flexible and help each other out.

He sat down with his people and talked to them and started to hear what they were telling him. Slowly he began to rethink how he ran his plant, and develop ideas of what was needed to improve the situation. He introduced changes with the result that people want to work there. They now believe that there will be opportunities for their development, and that they will be able to fill multi roles and make a difference to the business’ success.

All this occurred because the boss had a wake-up call and realised that **how it is now doesn’t mean that’s how it has to be in the future!**

He recognised the value of taking the time to see what was really going on, talking to his people, and reflecting and analysing what he was finding. He realised that wise investment in his people and their development could change both the way his company operated and how it was perceived. Not only did this benefit all those involved with the business, but the bottom line has never looked healthier.

As he said, **“I had to take the time to stop, look, listen, reflect and think. I had to believe that we could do things in a better way and that, just maybe, my people had as much to offer as I did. After that it came down to really recognising the potential of all my people and giving them a sense of pride in what they do. I’ve joined a breakfast business club and bring back ideas to share with the teams at breaks, in discussion groups and at staff meetings.”**

Jot down in the space below any thoughts that this case study triggers for how you run and manage your own business.

Checklist

To help you prepare to review your current approach you may find it beneficial to use the checklist below.

	Yes	No
Do you have a profile that describes the skills, knowledge, qualifications, experience and special abilities of all your people?	<input type="checkbox"/>	<input type="checkbox"/>
Does your business have a regularly reviewed and updated job description and person specification for each job role?	<input type="checkbox"/>	<input type="checkbox"/>
If 'Yes', do you use this information when recruiting and selecting people?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a formal induction process to acquaint people with the company and its practices and procedures?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a process to identify the learning and development needs which must be addressed if new people are to fully satisfy their new job role?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have in place a process of regular performance and personal review for all your people?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have in place a process of regular business review to help you identify any area of skills development?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have in place an annual plan for learning and development to support all your people?	<input type="checkbox"/>	<input type="checkbox"/>
If 'Yes', does this recognise both on and off-the-job development opportunities and attribute them with equal significance?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a regular dialogue with your representative groups?	<input type="checkbox"/>	<input type="checkbox"/>

Making it happen

There are four stages:

- communicating with your people what you are trying to do
- information gathering
- analysis
- prioritising, planning and preparing for action.

Stage 1: Communication

Your business may be small, but it depends upon its people understanding what is going on.

As you prepare to review, revise and improve the way you identify the development needs of your people and the business, it is important that you discuss what you are doing and why with your people.

People may be suspicious, they may be uncomfortable talking about performance, and they may fear that you have an ulterior motive. It is vital that you help them to want to contribute to a more focused and robust approach to identifying and meeting their real development needs.

Prompt...

Have you considered how being open and transparent about your own development will influence your team's attitude towards learning?

Case study

Lawson's, a small solicitors' practice of twenty people, had always prided itself on its reputation as a company committed to staff training and development. However, somewhere along the line it had all just become something of a habit and not something anybody expected would benefit the business.

Certainly the lawyers had to do so many hours recognised activity to satisfy their continuing professional development (CPD) requirements, but it didn't really seem to matter what they did. They just logged the hours and kept their licence to practise.

Over half of the workforce are support staff and, traditionally, each year someone did something time costly such as an HNC or an HND or some paralegal training. At least it gave them the opportunity to get a pay rise. Other than that there seemed to be very little direct benefit to the business from all this activity, although people did tend to stay.

The senior partner recently attended a national conference. He came back in a state of shock after a conversation with another lawyer who said, **“No learning or development takes place in my company unless it's been approved. To be approved it's got to meet real business needs, must be capable of being applied, and must line up with our stated business objectives. That means that we have had to change the way we do things. We have had to find out just what skill and expertise we have, identify the gaps, and then decide who should be trained up, how and when. It took us some time but we've cracked it now. Nobody goes on anything just because it's their turn, or the flyer looks good, or it's being delivered near to where their mother lives! The bottom line is that it has got to bring back benefits to the business.”**

The senior partner talked to all of his people about this conversation, and asked them how to start and establish the skills baseline and how to properly identify and meet their needs. He was amazed how pleased people were to talk about this, and how dissatisfied they had been with the previous way of doing things. They said that they saw this as a fair, equitable and transparent way of treating people and realistically developing them.

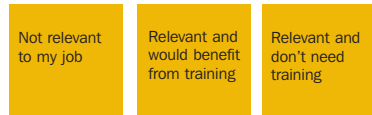
The senior partner was delighted and reflected later that he couldn't believe he got it wrong for so long. He was amazed how, by honest and open conversation, he was able to so easily introduce a new way of doing things which would benefit everyone.

Skills and training needs review

Line Management

How to complete this form

Listed below are the skills which we believe are required of people with any degree of management responsibility. They will not all be relevant to your job but if they are, please indicate whether or not you feel you could benefit from training in those areas.



	Not relevant to my job	Relevant and would benefit from training	Relevant and don't need training	Comments
Planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
daily	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
weekly	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
monthly	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
yearly	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Identifying priorities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Identifying where time is wasted	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Managing interruptions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Communicating	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
to the team	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
to your boss	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
to other departments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
letter writing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
by telephone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
by email	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Participating in meetings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Chairing meetings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Making presentations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Dealing with customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Handling complaints	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Giving constructive criticism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Handling grievances	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Handling disciplinary procedures	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Problem solving	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Skills and training needs review

Line Management



Comments

	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Decision making	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Controlling costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Preparing budgets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Other financial tasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Setting team objectives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Motivating the team	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Checking on performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Involving the team in decisions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Leading team discussions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Delegating	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Influencing others	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Negotiating	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Identifying training needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Planning training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Designing training sessions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Delivering on-the-job training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Keyboard skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Computer skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Interviewing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Appraising staff performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Marketing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Selling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Any other skills (please specify)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Wider issues

We are also interested in identifying any other areas that you feel the company needs to address in order to continue to improve. Your views on the following areas would be appreciated.

How well do the various departments/teams within the company appreciate each other's needs?

How would you describe the working relationships within your department/team?

How is information communicated throughout the company?

Are you clear about your role in the company?

If not, how could it be made clearer?

How effective is the management style within the company?

How would you improve it?

Are there any areas of work within your own job or within the company that you would like to know more about?

Any other comments?

Stage 2: Information gathering

Company-wide

It is time to look again at the business/operational plan.

- What does it mean for you in terms of the skills development your people may need?
- What is going on in your business sector?
- Are you affected by the global market?
- Is new legislation going to affect you?
- Are there new products, new materials, new processes, new plans that you are going to have to accommodate?

Checklist

Revisit your business plan and business objectives and record on the list below

Key Themes	Who will be affected?
<p>Examples:</p> <ul style="list-style-type: none">■ zero lost time incidents■ source and install new plant and processes■ secure new supplier to reduce present reliance	<ul style="list-style-type: none">■ whole workforce■ sales and warehousing■ purchasing department

It is good practice and makes good business sense to:

- review and revise your business/operational plan on a six monthly basis
- draw out the key themes and recognise the impact that they will have on your people
- use this information in your subsequent analysis of the business' development needs and to inform the planning process
- ensure that you have a profile that reflects the current capabilities of all of your people whatever their current roles
- ensure that you have a matrix which makes clear the knowledge, skills, experience, qualifications, attitudes and behaviours that you expect from each category of employee.

Team level

Most businesses rely on the efforts of their people working in teams. These teams should have performance targets and specific key areas of responsibility.

Any successful business needs to know how well its teams are functioning and what the blocks, barriers and issues are that may be affecting performance. To do this you may need to:

- observe and discuss
- involve the team in self assessment
- benchmark with other teams within the company
- benchmark with other companies
- encourage the processes of critical incident and near miss analyses.

Checklist

Revisit your business practices and look at how you identify team needs.

Do you	Yes	No
Set performance targets and review teams against them?	<input type="checkbox"/>	<input type="checkbox"/>
Encourage teams to self assess and identify their needs?	<input type="checkbox"/>	<input type="checkbox"/>
Benchmark?	<input type="checkbox"/>	<input type="checkbox"/>
Use critical incident analysis at team level?	<input type="checkbox"/>	<input type="checkbox"/>
Use near miss analysis at team level?	<input type="checkbox"/>	<input type="checkbox"/>
Involve team members in the recruitment and selection of new members?	<input type="checkbox"/>	<input type="checkbox"/>
Develop teams to be fully functional?	<input type="checkbox"/>	<input type="checkbox"/>

Individual level

All of your people should have current job descriptions and person specifications. These should form the starting point of your personal review process.

Your people should also have realistic and achievable performance targets which will help them to recognise the contribution they make to the business.

Your people should have the opportunity, at least annually, to formally review their performance, discuss the business' and their own practices, and identify their needs. It can be done as a blank sheet, but much greater consistency is achieved by using a semi-structured proforma to help you with this vital part of information gathering.

This workbook provides a sample version on page 20 which can be adapted if you do not already have such a system in place.

People usually value this formal opportunity to discuss their own and the business' needs. Such an exercise will, by its very nature, raise expectations and reveal concerns.

If you are to realise the benefits it is vital that you set up a tight schedule and adhere to an appropriate timetable for these conversations. You should keep everyone informed of progress and explain how the information gleaned will be used.

Depending upon the size of your business these interviews may be conducted by you as owner/manager or by your team leaders/direct line managers.

People will need to be reassured about how the information they reveal will be handled. They will also need to be satisfied that confidentiality will be respected and that something constructive will happen as a result.

At all three levels your information gathering relies upon:

- the structured approach you adopt
- your ability to get people to complete documentation and discuss their thoughts
- your ability to listen and absorb
- your ability to keep to a time scale
- your ability to reinforce the importance and purpose of the exercise
- your ability to act upon information you are gathering.

Checklist

To help you prepare to review your current approach you may find it helpful to use the checklist below.

Do you have	Yes	No
Annually updated job descriptions and person specifications for each job including your own?	<input type="checkbox"/>	<input type="checkbox"/>
A skills assessment proforma used by all of your people against the requirements of their job role?	<input type="checkbox"/>	<input type="checkbox"/>
An annual appraisal/review process for all of your people?	<input type="checkbox"/>	<input type="checkbox"/>
A designated time each year to gather information of this sort?	<input type="checkbox"/>	<input type="checkbox"/>
Focus groups and improvement teams looking at the general demands placed on your people?	<input type="checkbox"/>	<input type="checkbox"/>
Training request forms authorised by line managers with explicit, performance-led objectives?	<input type="checkbox"/>	<input type="checkbox"/>

Prompt...

To get people talking **remember** to use open questions:

what?

why?

when?

where?

how?

for whom?

To **probe** using:

tell me about...?

how would you...?

how could we...?

This same approach, sprinkled with specific statements that call for a response, applies to any **questionnaires** you design and use:

how would you rate...?

how clear are you...?

what support have you...?

Do **not** gather information if you are not going to use it; it insults your people, wastes everyone's time and calls your integrity into question.

Activity

Take some time to answer the following questions.

How do you currently identify your people's learning and development needs?

How could this be improved?

What changes would you have to make to your current practices and what benefits should that produce?

Training needs analysis questionnaire

Name:

Job title:

Dept/Section:

Report to:

How long have you worked for the company?:

How long in present position?:

Previous roles at this company and previous companies:

Briefly describe your job and its main purpose:

What are the main tasks involved? (in order of importance)

What are the key skills involved in doing your job effectively?

What (if any) specialist knowledge is required?
(e.g. Health and Safety Legislation):

What can you do now that you could not do when you moved into your current job role?

What are the benefits to the company?

Do you have management/supervisory responsibilities? If so describe what they are:

How much supervision/management do you need to do your job?

Very Little

A Lot

1

2

3

4

5

What is the most difficult part of your job?

What is the easiest?

Training needs analysis questionnaire – *continued*

What are the key results of your work?

Do you work as part of a team?	Yes	No
--------------------------------	------------	-----------

If 'Yes', does everyone in that team do the same job?

If 'No', list the different jobs that make up the team:

Do you fully understand the roles and responsibilities of others in the company?

How much flexibility is there in the jobs in your team?

None

1

2

3

4

Very Flexible

5

Would greater flexibility help your department or team?

How is your job likely to change in the future?

Next year:

Up to 3 years from now:

What new skills might you need?

How would you prefer to get these skills?

How could access to learning and development opportunities help you do your job better?

What might prevent you accessing these opportunities?

What would help others in your team to improve their performance?

What do you consider to be the main problem facing the company?

From the development you have experienced in the past, what type have you learned most from?

Rate by circling from 1 (least) to 5 (most).

Self teaching/following manuals	1	2	3	4	5
Group activities with a tutor/teacher	1	2	3	4	5
Classroom or seminars	1	2	3	4	5
Completing set assignments	1	2	3	4	5
Working alone through course material (books, e-learning, etc)	1	2	3	4	5
On-the-job training	1	2	3	4	5

Any other comments:

Stage 3: Analysis

By following these first two steps you should have generated a significant amount of data that now needs to be used.

Many SMEs stick at this point. They baulk at the time that needs to go into analysis, prioritising, planning and communication, but when these next steps are not taken the whole business benefit is at best diluted and at worst lost altogether.

You now need to sift and sort:

- the frequency of comment
- the importance of each development area.

A structured list is vital. An example is given below:

Need identified	For whom	By when	By whom	Potential cost	Potential benefit

It is important to remember that we are talking about needs which, if unaddressed, will impact negatively on the overall performance of the business.

It is also important to remember that the requirements can often be met in-house with access to the resident experts. Structured coaching and mentoring may best fit the needs of your people and the business.

However they are provided, learning opportunities need to be thought through, recognised as an important aspect of everyday work, and valued by everyone involved.

Development needs are likely to fall into the following key areas:

- knowledge and understanding
- skills and application
- attitude and behaviour
- innovation and continuous improvement.

Historically the emphasis has been on knowledge and understanding although all four areas are now increasingly regarded as important.

Case study

The company is beginning to work with agency staff from the European Union. Whilst there is no doubt that they are good workers, who are prepared to work long hours for basic pay. However, there are major concerns. In particular, you worry about their level of English comprehension and how these people might react in a Health and Safety emergency.

You are also concerned about some of the antagonism that's beginning to surface from some of your local staff. You suspect that they may be feeling a bit threatened and undermined by the skills and dexterity of their new colleagues.

Your analysis shows that you need to do something about:

- language skills training
- recruitment and selection skills training
- supervisory training
- diversity awareness.

You recognise that very little of this is specific to job roles, but if you are going to work increasingly with Europeans you have to act before you are faced with a serious incident.

Checklist

To date within your business:

Does your approach to needs identification work at the level of:	Yes	No
■ the business?	<input type="checkbox"/>	<input type="checkbox"/>
■ its teams?	<input type="checkbox"/>	<input type="checkbox"/>
■ its individuals?	<input type="checkbox"/>	<input type="checkbox"/>
Does your approach currently fully identify for all your people:		
■ knowledge and understanding required?	<input type="checkbox"/>	<input type="checkbox"/>
■ skills and application required?	<input type="checkbox"/>	<input type="checkbox"/>
■ attitude and behaviour?	<input type="checkbox"/>	<input type="checkbox"/>
■ innovation and continuous improvement in practice?	<input type="checkbox"/>	<input type="checkbox"/>

As you continue to sift through the information you have gathered, you also need to take into account other factors:

- **What training do my people need immediately?** – new equipment about to be installed; addressing unacceptable performance; ensuring newly appointed people meet our compliance standards.
- **What development will be needed over the next six months?** – to meet new demands being placed on the business; to cover maternity leave; to prepare for restructuring and staff retirement.
- **What development will be needed during the twelve month period?** – to prepare new teams; to maintain existing skills levels; to refresh knowledge/understanding and critical behaviours.
- **What are your long term needs?** – what industry/sectoral requirements are on the way; what are your customers and suppliers likely to require of you; how do you become more self sufficient and bring more learning and development activity in-house.

You will find that some of the emerging needs are **company-wide**. You will still need a planned and prioritised approach to avoid random interventions, and prevent lack of ownership and accountability.

Other needs will be **departmental or team specific**, whilst others will be **unique to individuals**.

You may find it useful to revisit the list that is beginning to emerge as a result of your analysis and classify the needs as:

- ★★★ essential to maintain current levels and expectations
- ★★ highly desirable to achieve the objectives of the business plan over the next three years
- ★ aspirational to help with the longer term development of individuals, teams and the business.

A simple three star rating and the use of different colour codes will help you through this time consuming but essential step.

Stage 4: Prioritising, planning and preparing for action

It is essential that you sustain and complete the whole cycle. Having involved all of your people in performance-based information gathering they need to know what you have discovered and what happens next.

Depending upon the size of your business, you may need to present your findings to the senior management team to get them to authorise the approach you are proposing to take.

You need to manage the process. You will have created expectations. People will expect something to happen, not least of which is to know what happens next and when.

Checklist

As you prepare to pull your business' development plan together check the following points.

Have you:	Yes	No
linked everything back to the business plan?	<input type="checkbox"/>	<input type="checkbox"/>
used all the information you have gathered?	<input type="checkbox"/>	<input type="checkbox"/>
interviewed and involved everyone?	<input type="checkbox"/>	<input type="checkbox"/>
been objective in your analysis of the data collected?	<input type="checkbox"/>	<input type="checkbox"/>
resisted personal prejudice and preference?	<input type="checkbox"/>	<input type="checkbox"/>
looked at industry trends and regulation?	<input type="checkbox"/>	<input type="checkbox"/>
created a comprehensive list of development needs?	<input type="checkbox"/>	<input type="checkbox"/>
categorised each need?	<input type="checkbox"/>	<input type="checkbox"/>
identified priorities in terms of time scale and importance?	<input type="checkbox"/>	<input type="checkbox"/>
recognised company-wide needs, team needs and individual needs?	<input type="checkbox"/>	<input type="checkbox"/>
recognised organisational issues beyond the scope of development intervention?	<input type="checkbox"/>	<input type="checkbox"/>

Summary

At this point you should be able to produce a prioritised development plan.

The next stage is to consider the resource implications. You will need to plan objectively to enable you to deliver the learning development interventions that will effectively address the needs you have recognised.

This is the subject of the second workbook in this series.

We recommend it to you. Having successfully reviewed, revised and enhanced your approach to identifying your business' development needs, it forms the natural next step to helping you prepare to effectively deliver what your people need.

You will be guided to produce a costed development plan which will help you to achieve the objectives stated in your business plan.

Do not forget that this is a complete cycle. Development requirements that have been identified will need to be addressed and success will generate new needs.

Glossary

Words can mean different things to different people. This glossary explains what certain words mean within the context of this series of workbooks.

Benchmarking: An approach which enables you to compare your company's strategies and practices with those of your competitors or other similar organisations.

Business Plan: The plan that sets out the company's objectives.

Capability: The knowledge, skills and behaviours needed amongst the company's people.

Capacity: The skills and abilities a company needs to enable it to respond to current and future business needs.

Coaching: A planned process that, through the use of effective questioning and feedback, aims to improve the performance, learning and development of an individual or work team.

Competence: The knowledge, skills and understanding to enable you to consistently perform the whole work role, in the working environment, to deliver prescribed business results.

Contribution: The ideas, time and effort people give to the company to help it achieve its objectives.

CPD: Continuing Professional Development.

Critical incident analysis: The process of recognising and learning from real life, workplace based, critical incidents to inform the company's practices.

Evaluation: The review of the results of learning and development activities to discover whether the objectives have been satisfied and the impact on performance has been achieved.

IIP: Investors in People, a national standard of business practice.

Impact: The results achieved from an intervention and the effect this has had on performance.

Innovative: New or improved ways of thinking and doing things.

Intervention: A planned activity with anticipated specific outcomes which benefit the workplace.

ISO 9001/2000: A recognised quality assurance system which is externally audited.

Job description: A regularly updated document which outlines the key roles and responsibilities of post holders.

Learning and development: Any activity that develops the knowledge, skills and behaviours that the company needs to meet its objectives.

Learning styles: The way people prefer to learn.

Mentoring: Advice and guidance offered by a more experienced person to help develop an individual's potential. Mentoring tends to focus on long term career goals and is *not* usually provided by the direct line manager.

Near miss analysis: The process of recognising and learning from real life, workplace based, near misses to inform the company's practices.

Person specification: The regularly updated description of the personal qualities, attitudes, behaviours, qualifications and experience required of post holders and team members.

Personal development: Any planned activity that develops an individual's knowledge, skills and behaviour. This need not be specific to the current job role or the current employer.

Profile: A structured representation of the company's needs for skills, knowledge and behaviour across the various job roles and categories.

QA: Quality Assurance system, either internally or externally validated.

Return on Investment (ROI): Demonstrable performance improvement as a result of investment in people development.

Role model: A person who acts in a way that is valued by the company and creates a positive example for others.

Sector Skills Councils (SSCs): Employer-led, independent organisations with responsibility to improve learning supply including apprenticeships, higher education and National Occupational Standards.

Self review: An evaluation practice that uses an agreed and structured approach.

SMART objectives: The results the company aims for, if it is to achieve its vision. They need to be **s**pecific, **m**easurable, **a**chievable, **r**ealistic, **t**ime bound and testing.

Succession planning: An aspect of workforce planning and development. It acknowledges the age profile of the workforce and usual turnover, and develops the potential in people to allow them to be eligible to progress to next level posts.

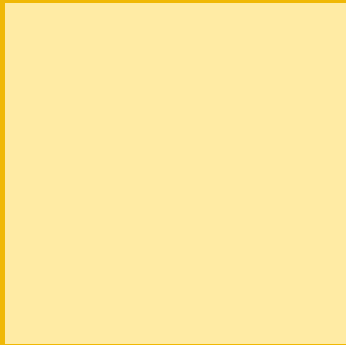
The Excellence Model: A model developed to help businesses in Europe become more competitive and sustainable. It focuses on enablers (how you do things) and results.

Values: The principles that underpin how the company works, such as – ‘safety comes first’ or ‘our people matter’.

Virtual or complete cycle: The process of involving people and teams in the definition of needs and the review of the effectiveness of the ways in which those needs have been met.

Vision: Where the company wants to be in the future, and how it wants to be perceived by its people and its customers.

Notes



**To search our database of over
100,000 learning opportunities
please visit our website:**

www.lids4b.com

**Impartial advice and support
is always available via our helpline**

08456 000 111

