

TRAINING NEEDS ASSESSMENT: PROJECT PLANNING CHECKLIST

Use this checklist before conducting your needs analysis to prepare for a thorough and efficient process that prioritizes business goals.

1 What are the business **needs** of the analysis?



- A new product
- A major change to a product/policy
- A new regulation (internal/external)
- A performance problem
- New technology
- Staffing changes/promotions
- Re-organization process
- Other

2 What are the business **objectives** of the analysis? What business **concerns** do you want training to address?



- Increase production/performance
- Reduce expenses/errors
- Comply with regulations
- Other

3 How many **employees** at the company will be affected by the analysis?



What is the approximate size of the target audience by position and geographic location? How many departments will be the subject of the analysis?

4 Who are the major **sponsors** and **stakeholders** for this project?

5 **When** is the training needs analysis required to be completed?



Is the analysis related to other projects and timelines? What is the projected timeline for implementing the training?

6 What will be the measure of a **successful** training needs analysis report?



- General staff
- Subject matter experts
- Written reports, records, specs
- Product information
- Existing courseware
- Existing proprietary applications
- Identify champions for each audience

7 Identify **who is available** to help conduct the analysis and source of information for the analysis.



- Development stage of product/service
- Product launch deadlines
- Expected implementation dates
- Other project milestones
- Current project timeline
- Financial/schedule/skills/environment constraints

8 Are there any **constraints** on this project?

9 Are there any **considerations** to be made regarding the training environment, audience and the learner preferences?



- Preferred instructional modalities (ILT, CBT, OJT, WBT), elearning, microlearning, virtual, gamification
- Projects that may impact analysis?

Using this checklist to think through your business needs, resources, timelines and constraints will help you conduct a thorough and effective needs analysis. Learn more with Training Industry's Training Needs Assessment Certificate.

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