

## CH 4 : Needs Analysis

### Learning Objectives :

**After reading this chapter, you should be able to:**

- Describe the purpose of a needs analysis.
- List and describe the steps in conducting a needs analysis.
- Differentiate between proactive and reactive needs analysis approaches, and describe the situations favoring the use of one over the other.
- Describe the relationship between needs analysis and the design and evaluation of training.

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### WHY CONDUCT A TRAINING NEEDS ANALYSIS?

● ليش المدربين يحتاجوا يعملوا TNA ؟  
- عشان نحدد أداء الموظف ونعرف ليه بقدم أداء أقل من ما هو مطلوب منه أو عشان نحافظ على أدائه الحالي

**TNA** : is a systematic method for determining what caused performance to be less than expected or required.

- the “trigger” for doing a needs analysis occurs when actual organizational performance (AOP) is less than expected organizational performance (EOP) . We refer to this difference as the organizational performance gap (OPG) .

الـ TNA بتعمل identification لل performance gap

$$\text{OPG} = \text{EOP} - \text{AOP}$$

بتصير الفجوة لما يكون  expected > actual

- A TNA is important because it helps determine whether training can correct the performance problem. In some cases, the TNA indicates that employees lack the necessary knowledge, skills, and attitudes (KSAs) to do the job and they require training. In other cases, employees have the KSAs to do the job, but there are roadblocks that prevent effective performance. These barriers need to be identified and removed. As a training professional, you will use the TNA to ensure that you provide the right training to the right people

- احنا كمدرسين لازم نسأل حالنا هل محتاج نعمل تحليل لإحتياجات الموظفين اولاً ، لأنه مش دائماً في حاجة نعمل TNA ، في مرات ممكن نروح عالتمرير direct ، مثلاً لما يكون عندي موظفين وجبنالهم عالشركة الات جديدة ، هون ما بلزم اعمل تحليل لأنه كلهم ما بعرفوا يستخدموها ، بهاي الحالة بدخلهم عالتمرير direct

- The training needs analysis phase is the most important phase in the training process , unless you get this part right , the rest of what you do as a trainer won't make any difference.

- اذا مكنناش دقيقين بهاي المرحلة ، باقي الاشياء إلي حنعملها في المراحل القادمة رح تكون عالفاضي

- Using TNA ensures that your training focuses on KSAs the trainer really need
- The need analysis allows the trainer to begin by explaining how the training will be useful , if trainees see the training as relevant , they are more likely to be interested in attending and maintain interest during the training

بإختصار 

### **importance of TNA :**

1. It indicates if employees lack of KSA to the job

2. It indicates if the employee has the KSA but there are roadblocks that prevent effective performance



إلي هي زي تكون الإدارة سيئة أو المدير لئيم ما يساعد أو يكون في إجراءات دقيقة كثير بالشغل

3. It determining if problems can be solved by training  
بتخليني اكتشف اذا التدريب هو الحل أو لا
4. It provides and evaluation measure after the training  
بتعطيني مقياس للتقييم ( لآخر مرحلة ) فيتكون input مدخل لالها
5. It provides a benchmark of the performance level and KSA employees posses before training  
بتعطيني معيار لمستوى الأداء وال ksa الي كانوا يمتلكوه الموظفين قبل التدريب

- ال TNA ك Process هي عبارة عن systematic process ، يعني في خطوات متتالية مهمة بتيجي ورا بعض ، مرات ممكن نعمل خطوتين مع بعض أو خطوات منفصلة بشكل متتالي ( ورا بعض )

### The TNA Model : نموذج تحليل الاحتياجات التدريبية :

#### تسلسل الخطوات :

- when a key decision maker suggests that there is a performance problem now or in the future, a TNA is triggered.
- The next step in the TNA model is the input, which consists of an **organizational analysis**, an **operational analysis**, and a **person analysis**.

بدنا نحكي عن كل ال 3 مستويات التحليلية :

1. **The organizational analysis** : is an examination of an organization's strategy, its goals and objectives, and the systems and practices in place to determine how they affect employee performance.

لما أعمل تحليل على مستوى المؤسسة ، ع شو لازم أدور وشو لازم أعمل ؟ بعمل فحص لأشياء خاصة بالشركة زي ممكن اتطلع ع الميزانية ، على الإستراتيجيات تاعت المؤسسة ، عالأهداف والغايات ، عال mission ، عال Resources ، عال policies ، reward system ، job design ..... إلخ

2. **operational analysis ( Expected performance (EP) )** : is the examination of specific jobs to determine the requirements, in terms of the tasks required to be carried out and the KSAs required to get the job done.

هاد المستوى أعمق من الي قبله ، على إيش بدنا نتطلع هون ؟ بنتطلع عال performance نفسه ، منفحص ال job نفسه ، بجمع معلومات مثل : Job dicription , job specification ، ..... إلخ

Hand in Hand OPG → في مصطلح اسمه

يعني مرات ممكن أعمل تحليل 2in1 إلي هو تحليل ال ORG ، وتحليل Operational منعلمهم بشكل تزامن ، هاي الطريقة بتساعدني اكتشف ال gap بشكل أسرع ، هي عملية مش سهلة ولكن يُفضل إنه نعلمهم سوا

3. **person analysis(Actual performance (AP) )**: is the examination of the employees in the jobs to determine whether they have the required KSAs to perform at the expected level, It is analogous to a job analysis, or a task analysis

مشابه

- هاد المستوى من التحليل عبارة عن شو المتوقع من الشخص نفسه وإيش رح يآدي ، منفحص أداءه ومنشوف هل هو قادر يعمل واجباته وشو مطلوب منه ، اذا بكون قادر يعمل المطلوب منه بتكون المشكلة مش بالشخص نفسه.
- هون بتوفر معلومات عن ال actual performance (AP) وبنقارن بينها وبين ال expected performance وبيبين معي ال gap
- هاد المستوى من التحليل صعب شوي لأنه سهل أحكي فلان أداءه مش كما يجب ، لكن مش سهل أحط إيدي على شو النقص بالزبط واعرفه ، يعني سهل تقرير الأداء لكن صعب التحديد إيش بالزبط ، هون بتطلع عالتيقيم تاع الموظف نفسه

## Purpose of Person Analysis :

### ■ Identify individual job performance gaps

### ■ Determine cause of performance gaps by:

► Comparing individual KSAs to those required to meet job performance standards.

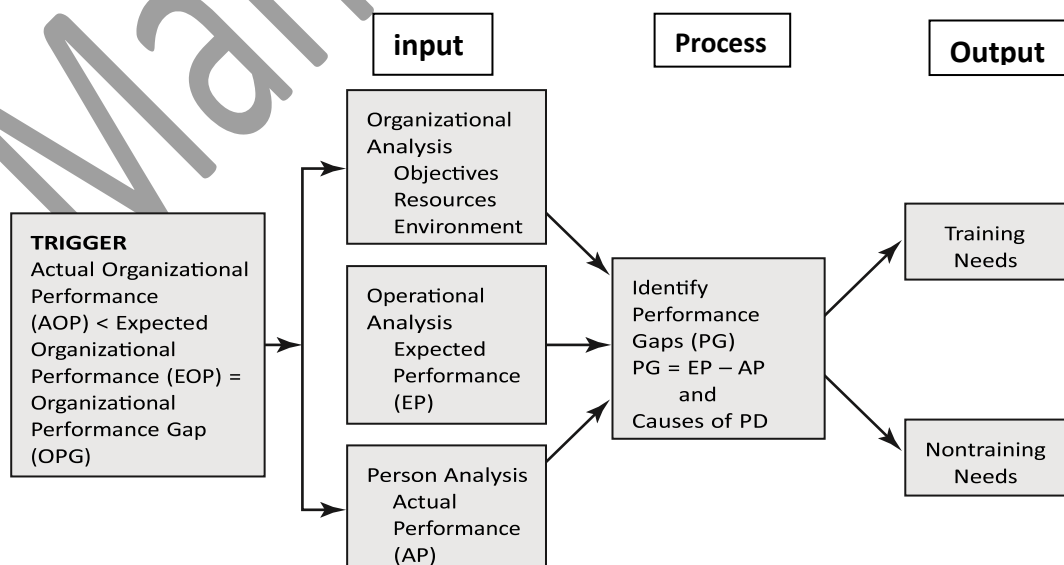
If KSAs are lacking Training MAY be a solution

If KSAs exist, training is NOT a solution

► Also need to examine motivation and environment factors. even for those lacking KSAs

● جدول ال 3 مستويات من التحليل لما اعملهم بصير قاذ اعمل identification واعرف إيش المشكلة بالأداء ، العملية هاي بنسميها (PD) performance discrepancy يعني الفرقية ، أو الفجوة بين إشي والثاني ، النتيجة بتحكي لي إذا في حاجة للتدريب أو لا

## تلخيص ال Analysis Phase ، رسمه ال TNA Model:



## Data Sources for organizational Analysis :

**TABLE 4-2 What Do You Ask and of Whom?**

What to Ask About	Who to Ask
<b>Mission Goals and Objectives</b>	
What are the goals and objectives of the organization?	Top management
How much money has been allocated to new initiatives?	Relevant department managers, supervisors, and incumbents
Is there general understanding of these objectives?	
<b>Social Influences</b>	
What is the general feeling in the organization regarding meeting goals and objectives?	Top management
What is the social pressure in the department regarding these goals and objectives, and regarding productivity?	Relevant department managers, supervisors, and incumbents
<b>Reward Systems</b>	
What are the rewards, and how are they distributed?	Top management
Are there incentives tied to the goals and objectives?	Relevant department managers, supervisors, and incumbents
What specifically do high performers get as rewards?	
<b>Job Design</b>	
How are the jobs organized?	
Where does their work/material/information come from and where do they send it when done?	Relevant supervisors and incumbents, and perhaps relevant department managers
Does the design of the job in any way inhibit incumbents from being high performers?	
<b>Job Performance</b>	
How do employees know what level of performance is acceptable?	Relevant supervisors and incumbents
How do they find out if their level of performance is acceptable?	
Is there a formal feedback process (performance appraisal for example)?	
Are there opportunities for help if required?	
<b>Methods and Practices</b>	
What are the policies/procedures/rules in the organization? Do any inhibit performance?	Relevant department managers, supervisors, and incumbents

## Data sources for operational analysis :

### Recommended Data Sources for Operational Analysis

Sources for Obtaining Job Data	Training Need Implications	Practical Concerns
1. Job Descriptions	This source outlines the job's typical duties and responsibilities but is not meant to be all inclusive.	Need to determine how developed. Often written up quickly by supervisor or incumbent with little understanding of what is required
2. Job Specifications	These are specified tasks required for each job. More specific than job descriptions and may include judgments of required KSAs.	May be product of the job description and suffer from the same problems
3. Performance Standards	This source provides objectives related to the tasks required and their standards in terms of performance.	Very useful if available, and accurate, but often organizations do not have formal performance standards
4. Ask Questions About the Job <ul style="list-style-type: none"> <li>a. Of the job holders</li> <li>b. Of the supervisor</li> </ul>	Asking both job holder and relevant supervisors provides accurate data.	Must be done correctly to be of value

## Data sources for person analysis :

**TABLE 4-8 Data Sources for Person Analysis**

Sources for Obtaining Data	Training Need Implications	Remarks
1. Supervisor Performance Appraisals	Useful if done specifically for TNA.	Supervisor ratings often not just for TNA, and often not done well.
2. Performance Data <ul style="list-style-type: none"> <li>a. Productivity</li> <li>b. Absenteeism and tardiness</li> <li>c. Accidents</li> <li>d. Grievances</li> <li>e. Waste</li> <li>f. Product quality</li> <li>g. Downtime</li> <li>h. Customer complaints</li> </ul>	Shows who is not meeting performance standards, but not why.	Useful, easy to analyze and quantify for the purposes of determining actual performance.

3. Observation—Work Sampling	More subjective technique but provides both employee behavior and results of the behavior.	This is done effectively in some situations such as customer service where employees know that the telephone calls employees answer from customers can be monitored.
4. Interviews/Questionnaires	Used here to focus on employee's perception of her training needs and attitudes. Also involvement in TNA motivates employees to learn.	Need to be sure employee believes it is in her best interest to be honest; otherwise, she may not be forthcoming as you would like. Also she may not know what her needs are.
5. Job Knowledge Tests	Shows specific KSA levels.	Care in the development of tests and scoring keys is important and difficult to do if not trained in the process. Can be tailor-made or standardized.
6. Skills Tests Simulations • Role-play • Case study • Business games • In basket	Certain knowledge, skills, and or attitudes are demonstrated in these techniques.	Care must be taken so that they measure job-related qualities. Useful, but again, care in development of scoring criteria is important.
7. Assessment Centers	Combination of several of the above techniques into an intensive assessment program.	Although expensive, these are very good as they use multiple raters and exercises to assess employees. Also, criteria for performance are well developed.
8. Coaches	Have extensive interactions with trainee and can get a good feel for gaps in competencies.	Coaches must be competent to assess training needs.
9. Individual's objectives	Shows the relationship between performance data and the individuals' goals.	Good process when implemented properly.

### ال job analysis فى إله 2 techniques لحتى نعمله :

1. **Task oriented** : identify various tasks / activities required to perform the job effectively + we examine these tasks to determine the KSAs necessary to perform these tasks effectively
2. **Work oriented JA** : Identify the KSA needed to perform on the job rather than the task / activity

Training is not always the best solution to a KSAs gap



## Other solutions

طيب عملنا تحليل عال 3 مستويات وخلصنا ولكن اكتشفنا إنه التدريب مش الحل ، طب شو نعمل ؟ في حلول ثانية بدنا نوخذها بعين الاعتبار بهاي الحالة عشان نقلل ال gap مثل :

1. **Job Aids**: A set of instructions/information that is available at the job site.

The purpose is to provide guidance to the worker Job aids are helpful for complex jobs that consist of several steps or are dangerous

نعطيهم إشي يساعدهم بوظيفتهم ويخليهم يقدرُوا يقوموا بعملهم على أكمل وجه مثل الطيارين ، زي لما نعطيهم دليل أو معلومات لحتى يكون أدائهم عالي ويحافظوا عليه

2. **Practice with coaching** :

مثلاً لما يكون الموظف يشتغل وفاهم شغله ماشاء الله عنه وكلشي تمام بس في عنده performance gap واضحة ومبينة كيف بدي أحلها ؟ مش ضروري تدريب ممكن أجيب زميل لإله يساعد بآشي معين وأخيه يدر به

3. **Redesign the job**: Sounds extreme but worth considering for qualifies employees

هون بغير طبيعة الوظيفة للشخص ، مثلاً بعرف انه في موظف شاطر ، بس النمط الي يشتغل فيه ما بآثر عليه بشكل ايجابي وبحفزه لتقديم أداء جيد ، بس هاي الطريقة منعملهاش لأي موظف غير لما أكون عارف إنه هالموظف محرز

4. **Termination or Transfer**: Sometimes neither training nor other options are the best to eliminate the PG - we might need to consider terminations or transfer

هاد يعتبر اخر حل ، هون يا بقل للموظف باي باي وبتهي خدماته عندي ، أو يا بنقله ع قسم ثاني اذا معنيين فيه

**باختصار** :

Upon Completion of TNA Analysis

Upon completion of

Org. analysis + Operational analysis + Person analysis

we come out with 2 different outcomes:

Training and Non-Training Needs (employee needs training OR no need for training)

Non-training needs show no gap in KSAs

PG is NOT a result of a lack of KSAs but due to the following:

بما إنه فحصنا وحللنا وطلع فش عنا gap بال KSAs يعني طلع عندي Non training Need يعني ما في حاجة للتدريب ، وال 4 نقاط الي فوق ما فادوني ، بهاي الحالة بتطلع على عوامل ثانية بتكون الها علاقة بنقصان الأداء :

### Non-Training Needs

Nontraining needs include those that show no gap in required KSAs and those characterized by a KSA gap but for which training is not the best solution. First, let's examine those that show no KSA deficiency.

NONTRAINING NEEDS THAT HAVE NO KSA GAP These PGs are not a result of a lack of KSAs, but a result of the following:

#### 1. Performance Consequence Incongruence:

نتيجة الأداء المتناقص ، وبيننا هاي بتصير ؟ لما نكون نحلل ونكتشف إنه في موظف شغل وحريث ، لكن كل ما يشتغل أكثر ال supervisor يعطيه مهام إضافية ، فأدائه بتراجع لإنه بحس إنه المسؤول عنه بستغله

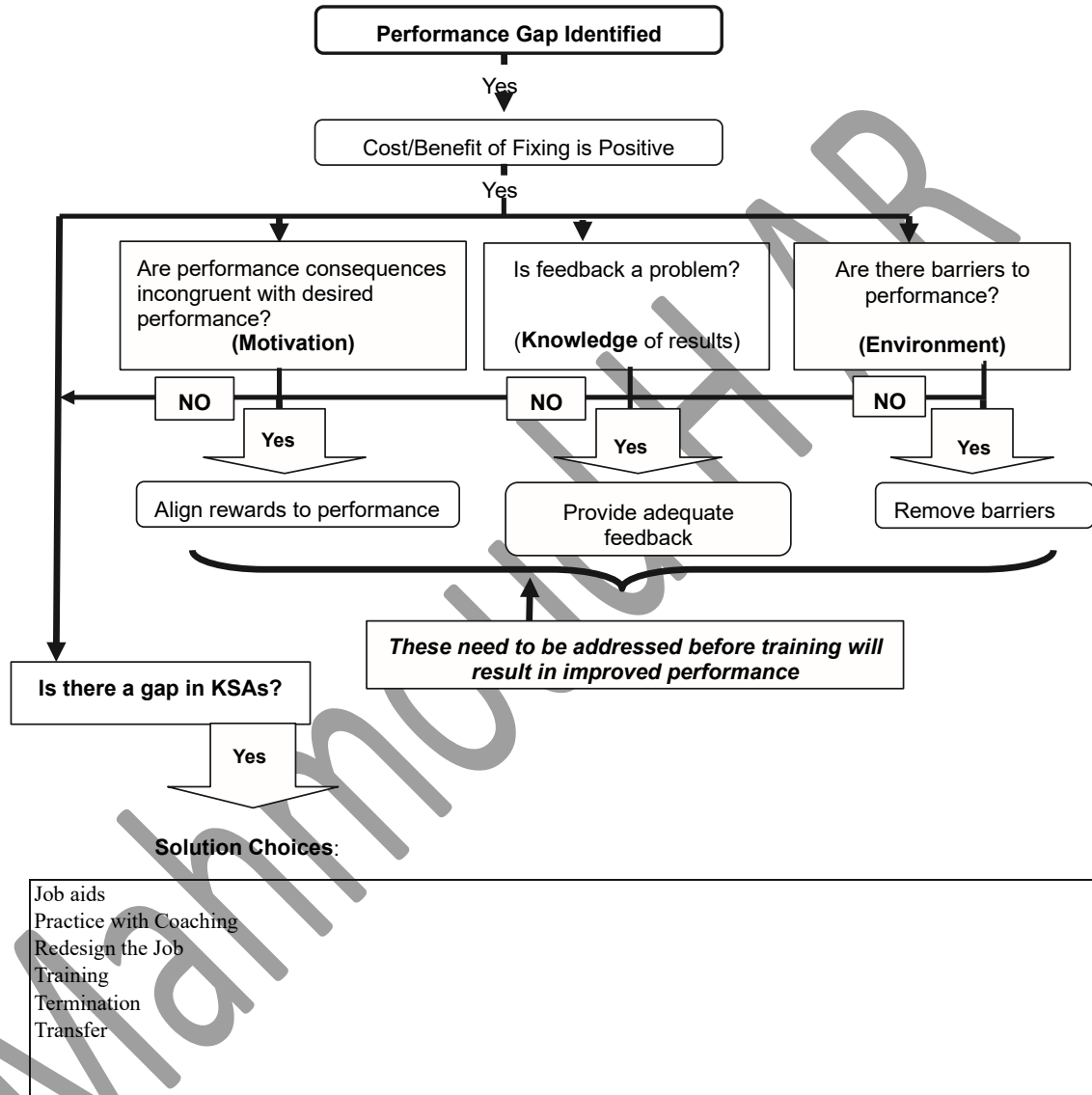
#### 2. Barriers to Performance :

الحواجز والمعوقات والظروف السيئة تعيق الأداء الجيد ، مثل إنه يكون المدير لئيم ، أو وجود ناس بتمارس العقبات علينا

#### 3. Feedback problems:

ما في فيدباك ، بتلاقي الموظف يشتغل كيف هو شايف لإنه ما في حد بصصح أو بحكيه ملاحظات أو حد يقله شو الي قاعد بتعمل فيه ، فبشتغل كلشي من كيسه

الرسمۃ التالیة بتلخص کل هاد الحکی :



## APPROACHES TO TNA

### Reactive TNA

في عندي نوع من التحليل اسمه

بهاد النوع منصب تركيزنا على مستويين من التحليل الي هما OPER و PERSON بعدين بدعم تحليلي لل Org analysis ، ممكن نركز ع دائرة معينة أو على وظيفة معينة بهاد التحليل

In **Reactive TNA**, we focus more on operational and personal analysis because the triggers are already identified, and we aim to identify the current PG

The organizational analysis will support us to understand better the situation by identifying incongruent consequences, feedback problems and performance barriers.

### Proactive TNA

في نوع ثاني من التحليل اسمه ←

إذا ما كان في عندي REACTION للتناقص بالأداء باجي على هاد النوع من التحليل إلي هو بجهز نفسي وبتوقع إيش ممكن يصير معي لقدام ، بحلل الإحتياجات التدريبية للمستقبل ، وبركز بشكل كبير على ال Org analysis عالاستراتيجيات ، الأهداف ، الهيكلية ..... إلخ ، وبدعم تحليلي بال Oper وبال person على العكس من ال Reactive

Proactive TNA : Focuses on performance gaps in the future , We focus on Organizational level requirements: new strategies, new tactics, new objectives and reflect the changes on the org. structure, policies, procedures

- طب لو سألنا مين النوع الأحسن فيهم proactive or reactive ؟  
ال proactive عشان نكون محضرين حالنا للمستقبل
- بس ال best senario يكون عندي خليط من النوعين ، هيك يكون محضر حالي proactive وبنفس الوقت إذا في شغلات لازم اهتم فيها يكون في عندي reaction فوري لالها
- من أهم أشكال ال proactive ال succession planing

In general, the proactive TNA is better than the reactive TNA because it is better to be aware of the PG that may take place before happening and that will help us be prepared and make better decisions and act more efficiently, yet the most effective is to use a combination of both approaches.

## **Summary of the chapter : ملخص سريع لأهم النقاط**

- Training is a reasonable solution when a PG is caused by an employee's lack of KSAs. However, most problems identified by managers as requiring training actually do not require training. Most such problems are a function of organizational barriers (reward/punishment incongruities, inadequate feedback, or system barriers) to performance. A TNA will reveal the location and reason for the problem.
- - the appropriate KSAs required to do the job are identified (operational analysis),
  - the KSAs of the employees in that job are determined (person analysis) so that only those needing training are trained, and the roadblocks to transfer of the training are identified (organizational analysis) and removed.
- The TNA consists of organizational, operational, and person analysis. The organizational analysis is designed to assess the capital resources, HR availability, and the work environment. It is important to understand the amount and type of resources available and what type of environment the affected employees work in. Often, employees are not performing at the expected level for reasons other than a lack of KSAs. The organizational analysis identifies these reasons so they can be rectified. Even where KSAs are the problem, other remedies (job aids, practice, and so forth) can be considered before training.
- The operational analysis provides information pertaining to the KSA requirements for the job in question. Observing the job, doing the job, and examining job descriptions and specifications are some of the ways of determining this information. The method most often used, however, is to ask incumbents and supervisors what is required in a systematic way.
- The person analysis provides information on each employee's specific level of competence regarding the KSA requirements. Several methods can be used to determine competence levels, such as examining performance appraisals, testing,

or simply asking employees where they encounter problems. Each of these approaches offers advantages, and the one you choose depends on factors such as time and availability.

- There are two types of TNA: proactive and reactive. With proactive TNA, the focus is on planned changes to jobs and performance expectations. Typically, these changes evolve from strategic planning, but also might occur from other processes. Because the proactive TNA anticipates future changes, it also must anticipate the KSAs required to meet or exceed performance expectations in the future. As a result, some of the types of information collected are different from those collected for the reactive TNA.
- The reactive TNA is far more common and is a response to a current PG. Here, the TNA needs to be completed more quickly because the gap is already affecting productivity. An effective organization uses both proactive and reactive types of TNA.

## End Of The Chapter😊