

The background is a solid light blue color. There are three paper airplanes. Two are white and one is red. The white ones are positioned on the left side, one above the other. The red one is on the right side, pointing towards the top right. A light green rounded rectangle is centered on the page, containing text. A white dashed line starts from the bottom left of the rectangle and curves downwards and to the left, ending near the bottom left corner of the page.

How to create an L&D Strategy from scratch

Lesson 2 out of 5

Understanding Business
Strategy, Needs and
Constraints



LESSON 2:

Understanding Business Strategy, Needs and Constraints

Post Lesson Activity A: Needs Analysis with Multiple Stakeholders

HOW TO USE THIS GUIDE

This guide consists of instructions and templates for you to conduct a series of needs analysis interviews with multiple stakeholders in your Power Team (check out lesson 1 if the term Power Team is unfamiliar to you).

The goal of the needs analysis is to gather information on what your organisation's current and future development needs are. With this information, you can then move on to Post Lesson Activity B to do a "Critical Gap and Prioritisation Analysis" to decide what to prioritise in your L&D strategy.

WHY DO IT?

Whilst you and your team can gather a lot of data on your own from performance or survey data, the perspective of business leaders responsible for driving the success of the business is invaluable.

Doing the needs analysis interviews also allows you to act proactively as a partner to the business by preemptively planning for their development needs as opposed to receiving training requests from the business when needed.



WHAT YOU'LL NEED

- The list of people in your “Power Team” that volunteered to provide design input
- Ideally two interviewers (one to take notes)
- If you are working as a team, you'll need a place to work and document results such as a miro workspace or confluence document

AGENDA

- Create a question and assumption parking lot
- List out and categorise the people you would like to conduct the needs analysis interviews with
- Conduct the needs analysis interviews (Senior Leadership / Team Leads or Middle Leaders / Employees)
- Consolidate key themes in the data



STEP 1: CREATE A QUESTION AND ASSUMPTION PARKING LOT

Instructions:

- If you are using an online whiteboard or notebook, carve out a section and replicate the image as seen below

As you go through the agenda, keep capturing any questions you have or assumptions that you are taking. You don't need to solve them there and then, you just need to capture them.

QUESTIONS	ASSUMPTIONS

STEP 2: LIST OUT AND CATEGORISE THE PEOPLE YOU WOULD LIKE TO CONDUCT THE NEEDS ANALYSIS INTERVIEWS WITH

Instructions:

- List down the names of business leaders that you MUST interview on the left
- On the right, organize the names listed according to whether they are Senior Leaders or Team and Middle Leaders.

PEOPLE TO INTERVIEW

MUST INTERVIEW

Business leaders that want to provide design input from your power team

Tip: Ensure that all business areas and levels of leadership are covered

Senior Leadership (i.e. executive leadership or anyone who has full responsibility over the success of a function/business area)

Team or Middle Leaders

- Finally, if your team has the time and resources, you can choose to do a more thorough needs analysis by speaking to employees.
- List down the names of employees you want to interview on the left. Organize the names by business area on the right.

OPTIONAL

1-2 employees from each business area.

Tip 1: If strapped for time, choose employees from business areas that will be key in the next 1-2 years

Tip 2: When selecting who to interview in each business area, it's best to interview a high performer and an employee that is struggling a little

Key Business Area 1:

Key Business Area 2:

Business Area 3:

etc.



STEP 3: CONDUCT THE NEEDS ANALYSIS INTERVIEWS

Instructions:

- Choose the appropriate interview template and conduct the needs analysis interviews with the stakeholders you have identified
- There are three interview templates available for you:
 1. Senior Leadership
 2. Team Leads/Middle Leaders
 3. Employees
- Each interview template is divided into two sections consisting of questions to identify current needs, and questions to identify future needs
- Each interview is designed to last approximately 30-45 mins
- Ensure to capture notes in your shared note taking document or online whiteboard (good record keeping is key!) You may also consider recording the interview if you are alone
- Tip: Send the questions before the interview so that your interviewees have time to reflect

Note: Remember to ask probing and follow up questions to really understand what the stakeholder means.

(E.g. Most leaders will tell you communication is an issue, but communication can mean everything from conflict resolution, cross-functional collaboration issues, strategy updates and more. If you stay on the level of “communication”, you won’t be able to find a suitable solution)



Template: Senior Leadership

Name:

Title:

Business area:

Questions to Understand Current Needs

What are your business area or target group's 1-2 year goals/targets?

What do your people need to do differently to achieve the business goals?

Follow up questions:

- What knowledge skills and abilities (KSAs) do they need to build for that?

- Which employee groups, roles or business areas need to develop them?

What percentage of that employee group have the KSAs mentioned?

Tip: Try to get a specific % for each knowledge, skill or ability mentioned

Follow up questions:

- What is keeping those employees from developing these KSAs?



Template: Senior Leadership

- What is the impact of those employees not having the skill?

What about leadership in the company? What KSAs do leaders need to have that are mission critical for the business?

Follow up questions:

- For each KSA mentioned, which level of leadership would most benefit?

- What percentage of leaders have the KSAs mentioned?

Keeping the company's 1 to 2 year strategy in mind, which groups of employees or roles do you think are key to driving the success of the business?

Follow up questions:

- Why these groups?

- What do you think would be key for them to develop?

- How big are these groups (approx. number of FTEs)

Template: Senior Leadership

Questions to Understand Future Needs

What are your business area or target group's 3-5 year goals/targets?

Follow up questions:

What are some emerging roles within your business area or employee group that would increase in importance over the years?

When you think about where the company needs to go in the next 3 to 5 years, what KSAs would be mission critical for achieving those goals?

Follow up questions:

- Why are they mission critical?

- Who needs to develop them?

- What percentage of those employees have the KSAs mentioned?



Template: Senior Leadership

What behaviors, mindsets and ways of interacting would you say are key to create our desired workplace culture? (If you have values, or a culture deck - here is a good place to remind your interviewee about it)

Follow up questions:

- Why are they key?

- What percentage of employees already possess these behaviors and mindsets?

What is the one challenge or opportunity that if we can help you address it, will really influence the success of the company?



Template: Team Leads or Middle Leaders

Name:

Title:

Business area:

Questions to Understand Current Needs

What are your team's 1-2 year business goals/targets?

What do your people need to do differently to achieve the business goals?

Follow up questions:

- What knowledge skills and abilities (KSAs) do they need to build for that?

- Which percentage of your team already has the requisite KSAs?

What are the key KSAs that all leaders, including yourself need to develop to be successful as leaders?

Follow up questions:

- What are the most important KSAs and why?
 - Follow up: For each KSA, which level of leadership would most benefit from it?

Template: Team Leads or Middle Leaders

What support would you appreciate from L&D?

Questions to Understand Future Needs

What kinds of development opportunities do your employees ask for?

Follow up questions:

- What is the most common ask from your employees?

- What development offering would keep your employees the happiest and most engaged?

What behaviors, mindsets and ways of interacting would you say are key to create our desired workplace culture? (If you have values, or a culture deck - here is a good place to remind your interviewee about it)

Follow up questions:

- Why are they key?

- What percentage of people already possess these behaviors and mindsets?



Template: Employees

Name:

Title:

Business area:

Questions to Understand Current Needs

What are your 1-2 year goals/targets?

What are the key knowledge skills and abilities (KSAs) that you feel you need to develop to succeed in your role?

Follow up questions:

- Why are they key? (How will they impact your performance?)

- How would you prioritise them in terms of importance?

If you could wave a magic wand and address two areas of improvement in the leadership within our organisation, what would you improve?

Follow up questions:

- Why those two?

- How would you prioritise them in terms of what is most essential to develop first?

Template: Employees

Questions to Understand Future Needs

What behaviors, mindsets and ways of interacting would you say are key to create our desired workplace culture? (If you have values, or a culture deck - here is a good place to remind your interviewee about it)

Follow up questions:

- Why are they key?

- What percentage of people already possess these behaviors and mindsets?

If you imagine your career in 2 to 3 years, what KSAs would you want to have developed by then?

Follow up questions:

- How would you prioritise them in terms of importance?

- What development offering could we offer that would really make you feel like you are growing in the direction that you want?



STEP 4: CONSOLIDATE KEY THEMES IN THE DATA

At this point, you and your team should have conducted enough interviews to get a clear picture of the current and future development needs for the different business areas in the organisation.

In this section, your goal would be to consolidate that information.

Instructions:

- As you read the interviews, highlight key themes that emerge across the various interviews (tip: use a different colour for each theme!)
- Using the themes identified, see if you can answer the questions below:

STEP 4: CONSOLIDATE KEY THEMES IN THE DATA

Questions		Answers (Identified Themes)		
Current Needs				
WHAT What are the KSAs that are mission critical for the business to succeed?	KSAs	WHO needs them	Why is it important?	What % of people have them?
	1...			
	2...			
	3...			
WHO What are the <u>employee groups, roles or business areas</u> that are key to driving the success of the business in the next 1-2 years?	Employee group/ business area	Why are they important?	What do they need to develop?	What % of people have them?

STEP 4: CONSOLIDATE KEY THEMES IN THE DATA

<p>WHAT</p> <p>What are the key KSAs that <u>leaders</u> need to develop?</p>	KSAs	What type of leaders?	Why is it important?	What % of leaders have them?
<p>WHAT</p> <p>What are the key KSAs for (insert business area 1) to develop?</p>	KSAs	WHO needs them?	Why is it important?	What % of people have them?
<p>What are the key KSAs for (insert business area 2) to develop?</p>				
<p>What are the key KSAs for (insert business area 3) to develop?</p>				
<p>Repeat as needed for the number of different business areas</p>				

STEP 4: CONSOLIDATE KEY THEMES IN THE DATA

Future Needs				
WHAT What <u>KSAs</u> would be critical for the success of the business in 3-5 years?	KSAs	WHO needs them	Why is it important?	What % of people have them?
	1...			
	2...			
	3...			
WHAT What <u>behaviors, mindsets and ways of interacting</u> (KSAs) are key to creating the desired workplace culture?	KSAs		Why is it important?	What % of people have them?
General				
WHAT What are the most requested development opportunities?	Development Opportunities		WHO Employee groups./business areas	
What support do people want from L&D?				

The End!



Congratulations on completing your Needs Analysis with Multiple Stakeholders!

Now that you have completed this and are faced with a mountain of needs, it's time to prioritize them! To do so, you can move on to the last post lesson activity from lesson 2: "Critical Gap and Prioritisation Analysis". You will learn to facilitate a prioritisation discussion with your key stakeholders to identify key learning priorities for the organisation.

If you are done with that, look out for lesson 3: "Creating L&D Goals and Metrics". We'll go over how to create L&D goals and set metrics to measure results for the L&D priorities that you have identified in Lesson 2!



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