



The Poor Man's Needs Assessment

Captivate. Educate. Activate.

Lesson 1.1 / 8.3 / 9.1

Is Training the Answer?

Instructional designers and training professionals often hear their business partners say something like this:

"My employees aren't doing X. They need training!"

And the seasoned instructional design or training pro responds with, "are you sure training is the solution? How about we conduct a needs assessment?"

The purpose of a needs assessment is to understand the conditions, processes, environments, and situations in which specific knowledge or skills are practiced to determine if training will be able to address the situation, and if so, to make sure the specific intervention is designed in a way that reflects how the skills will actually be used. A full-on needs assessment can be a fairly exhaustive process that involves task analyses, direct observation, focus groups, and more.

As such, the aforementioned business partner might respond, “I know what my people need. No time for that stuff. Just train them.” It’s worth noting that most often, they do know what their people need, but a needs assessment is still a good idea. When time or resources are tight, you can turn to the Poor Man’s Needs Assessment. In this process, you identify the specific behaviors or beliefs you want your learners to adopt and then you ask yourself, “Why aren’t they doing those things today?” or “What makes doing these things hard?”

“I know what my people need. No time for that stuff. Just train them.”



There are usually four reasons that someone isn’t doing what you want. They either lack the knowledge. They don’t have the skills. They aren’t motivated. Or external conditions (like their environment, their peers, their income, etc....) are keeping them from doing so. If it’s knowledge or skill, then learning content is the answer. Done well, learning content can also help motivate, but it’s likely to have limited effect if not combined with other motivational tactics. External factors are often difficult to address with content.

The goal of this analysis is to help focus your efforts on those behaviors that learning can best support, and help you avoid creating content that won’t really address the real problem. If, for example, your sales people aren’t selling a specific product because they don’t know how to explain its features and benefits, then that’s a knowledge/skill deficit. Training might really help. However, if they know all about its features and benefits but it’s just a lousy product, then training probably won’t do much for you. The Poor Man’s Needs Assessment is displayed below. It can be a simple 30-minute white boarding exercise, and can help drive an important conversation between you and your business partners.

The Poor Man's Assessment

Use this tool to analyze the behaviors or beliefs you want consumers to adopt. For each behavior, ask yourself, "Why aren't they doing this now?" Is it because they don't know something? Is it because they lack the skills? Is it because they aren't motivated? Or is some external factor getting in the way. This simple analysis can be very helpful in identifying what to teach as well as what learning solutions might work best.

Why aren't they doing _____?

Knowledge Deficit	
Skills Deficit	
Motivation Deficit	
External Factors	

Source: Cathy More