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Identifying learning and development needs

Learn how to identify learning and development needs at a range of levels, and leverage the results to enable greater business performance

Introduction

Clear, systematic and ongoing identification of how learning and development (L&D) needs relate to performance gaps is key in ensuring effective learning across an organisation. However, the process can be seen as a rigid, box-ticking annual exercise unless it's aligned with internal and external organisational drivers. The need for organisational agility means L&D professionals need to constantly recognise their organisation's performance needs.

This factsheet introduces methods to identifying L&D needs, including how to carry out a capability analysis and suggests how to collect and make use of data. It also provides insight for those in smaller organisations addressing their particular challenges in identifying learning and development needs.

The CIPD is at the heart of change happening across L&D, supporting practitioners in providing insights and resources. Connect with us through our [Leading in Learning network](#).

How are learning and development needs identified?

Identifying learning and development (L&D) needs starts with knowing the organisation's current and future capability needs, and then assessing existing levels of skills, attitudes and knowledge. This assessment can use formal and informal methods. Such an analysis will allow decisions about what learning is needed at individual, team or organisational

level. These gaps should be interpreted and prioritised within the wider organisational strategy. Our [Profession Map](#) highlights the need to define current and future capability needs of the organisation.

Implementing an ongoing learning needs analysis (LNA) is different to a training needs analysis (TNA). An LNA may be seen as a current or future health check on the skills, talent and capabilities of the organisation (or part of the organisation) and is carried out with multiple stakeholders. It's based on the ongoing systematic gathering of data and insights about employees' capabilities and organisational demands for skills, alongside an analysis of the implications of new and changed roles for changes in capability. A TNA is a one-off isolated event looking at the needs for a specific training activity.

The LNA process needs to flow from business strategy. Its aim is to produce a plan to make sure there is sufficient capability to sustain current and future business performance. It's also vital to consider statutory and compliance requirements. Our [2021 Learning and skills at work](#) survey offers an opportunity to benchmark the workplace skills gaps in organisations.

Links with learning and development strategy

Creating an effective [learning and development strategy](#) is critical to ensure the L&D approach aligns with business needs.

A clear analysis of L&D needs that informs such a strategy is important because:

- Organisational performance depends on having the right people in the right place with the right skills at the right time.
- It can give insight into the realities of the learning environment employees experience. Our [Learning cultures](#) research covers this in detail.
- Providing relevant learning opportunities can build organisational effectiveness as well as enabling staff to achieve personal and career goals which can increase employee engagement.
- Having a clear idea of the performance standards expected provides a foundation for L&D professionals to evaluate effectiveness and demonstrate the impact and transfer of learning.
- Well-planned learning can be an effective retention strategy, particularly when linked into [talent](#) strategies.

It's important that, whatever the performance gap identified and learning needs agreed, the organisation considers all the appropriate ways to meet that need, rather than defaulting to 'a course'. Read more on [evolving practice in L&D](#) and listen to our podcast on [Aligning learning with business objectives](#).

Preparing for a learning needs analysis

Engaging with a variety of stakeholders, including subject matter experts, operational managers and the impacted employees, is vital and they need to be consulted from the outset. This also continues when the results are communicated.

Levels of learning needs analysis

Analysis of learning and development needs can be done for:

- **The whole organisation** - to analyse the amount and types of learning needed to ensure that all employees have the right capabilities to perform in line with the organisation's strategy.
- **Aa specific department, project or workstream** - new projects and opportunities require new ways of working or reorganisation, while restructuring also impacts.
- **Individuals** - linking personal L&D needs to those of the business, often carried out as part of development review. See our factsheets on [performance management](#) and [performance appraisal](#) for more information.

The relevant team (for example, L&D or HR) needs to ensure that analyses carried out at any of these three levels are integrated and not seen in isolation.

If L&D activities are aligned to the organisational strategy, then this analysis will be an iterative process, with L&D teams working regularly with stakeholders to gain insight to the organisational needs to meet the internal and external demands.

The 'RAM' approach

While it's critical that any assessment of learning needs should be careful and thorough such a process also needs to be agile and readily responsive. Drawing on research findings, we developed an approach to learning known as RAM (Relevance, Alignment, Measurement) that still has value today. It's based on the need for:

- **Relevance:** How existing or planned learning provision will meet new opportunities and challenges for the business.
- **Alignment:** If the L&D strategy takes an integrated blended approach, it's critical for L&D practitioners to work with stakeholders about what their performance needs and how to achieve them. Aligning with broader organisational strategy gives focus,

purpose and relevance to L&D.

- **Measurement:** L&D effectively and consistently measure the impact, engagement and transfer of learning activities as part of the evaluation process.

Find out more on [measuring and evaluating learning outcomes](#).

Capability analysis

Knowing which current performance standards, as well as those expected in future, is the first step when reviewing skills needs. Keeping an open mind helps; nobody honestly knows what jobs will exist in the future, so developing agility and allowing people to be prepared for them is important. Next, for each category of employees covered, consider the following questions:

- Which capabilities will be required to carry out the roles? (the person specification)?
- Which capabilities already exist in the workforce (a formal or informal skills analysis)?
- What are the gaps between existing capabilities and new/future requirements (the learning specification)?

[Competency frameworks](#) can provide more detailed structures for looking at job requirements.

Performance consulting

Our [Learning and skills at work](#) reports shows that consultancy skills in performance analysis is a vital skill for L&D practitioners to develop. In the book [70 20 10 towards 100% performance](#), the authors show how the role of 'performance detective' is vital for L&D to analyse business needs.

Collecting and using the data

Gathering data on learning needs

After planning the frequency, extent and nature of the analysis, the next stage is to decide how the information can be collected. Potential methods include:

- Organisational data and intelligence – 'mining' the existing data that's collated in the organisation is a great start point.
- Formal interviews and/or focus groups with stakeholders - these will often be primary sources of information on plans, work organisation and changes.

- Informal conversations with stakeholders – ‘coffee chats’ are a good source of finding out what is needed.
- Team meetings - attending team meetings across the organisation can give insights on performance needs.
- Observations – engaging with the learners’ current ‘real world’.
- Questionnaire-based or other surveys of managers, employees and their representatives. However it’s vital that time is spent considering the questions that are asked, the likely response and what is done with the responses.
- Existing data - for example from management information systems or virtual learning environments/ learning management systems.
- Information and analysis from competency frameworks.
- Performance management data.
- Documentation – for example organisation wide business plans, objectives and work standards, job descriptions and person specifications. This tends to be desk based and will support other methods.

A mix of these methods at the same time will give the best results.

Much of this data will be sensitive, particularly where individuals’ knowledge and skills gaps are exposed, so confidentiality must be respected. In addition, there are times when major change is planned that senior management wish to keep confidential. In these situations, L&D professionals may need to build relationships and work with managers to show how L&D can contribute to the success of an initiative.

L&D professionals may wish to take advantage of analytic approaches using 'big data' which can provide more insight. See our [Talent analytics and big data](#) research report.

Using the learning needs analysis results

Collating the information from the needs analysis will allow a number of outputs that can happen concurrently:

- **A report of overall learning needs for the organisation or department** - to form the basis of an L&D strategy or input to business planning processes.
- **Prioritising the identified performance gaps** - that is, where the gaps are most

critical. Concentrating on results required for the learning outcomes is important.

- **Learning and development plans** - Once priorities and budgets are identified, the L&D team will be able to set plans for learning solutions. These plans will prioritise appropriate ways to meet the needs identified. Line managers will also have a clear idea of where they need to coach or develop skills in their teams. This needs to be a rolling process not a once only.
- **Personal development plans** - Plans for individual learning, aligned with the resources available.
- **Is formal intervention needed?** A number of organisations say they offer a 70:20:10 approach to learning. The needs analysis may support using job-related experiences (the 70%) or interactions with others (the 20%) rather than formal elements (the 10%).

See more on our [learning methods factsheet](#).

All the outputs should be discussed and agreed with relevant stakeholders involving senior managers, the learners and their line managers.

Learning needs analysis for smaller organisations

The formal process of LNA may seem best suited to larger organisations where dedicated L&D teams exist to deliver learning. However, identifying performance gaps which align learning provision with strategy and the delivery of business results applies to smaller organisations too. In such organisations, where people often fulfil multiple roles, it's useful to focus on:

- Closely consulting with business leaders on how any skills gaps can be identified and addressed.
- Fully assessing the costs and benefits that apply for smaller businesses.
- Exploring sources of funding/resourcing - government support may be available for smaller enterprises, for example around apprenticeships, while student projects can also provide short-term capability and skills.
- Developing solutions that allow flexible learning or alternative forms of delivery.

Further reading

Books and reports

BEEVERS, K., REA, A. and HAYDEN, D. (2019) *Learning and development practice in the workplace*. 4th ed. London: CIPD and Kogan Page.

LANCASTER, A. (2019) *Driving performance through learning*. London: Kogan Page.

PARRY-SLATER, M. (2020) *The learning and development handbook*. London: Kogan Page.

ROBSON, F. (2009) *Learning needs analysis*. CIPD Toolkit. London: CIPD.

Visit the [CIPD and Kogan Page Bookshop](#) to see all our priced publications currently in print.

Journal articles

JOHNSON, B. (2017) [Learning needs analyses often feature too little analysis](#). *People Management* (online). 8 April.

MURPHY, N. (2015) [Reliable TNA in seven steps](#). *Training Journal*. January. pp29-32.

SHIPLEY, F. and GOLDEN, P. (2013) [How to analyze and address your organization's learning needs](#). *T+D*. Vol 67, No 3, March. p29-31.

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This factsheet was last updated by David Hayden.