



Tuesday, September 07, 2004

Needs Assessment Interview Protocol

To identify performance needs, there are three basic steps:

- 30 second elevator discussion, which offers an invitation to discuss opportunities
- 10 minute follow-up, which is a follow-up conversation that establishes FSAU as resource
- 2 hour needs assessment, which enables FSAU to research issues and propose solutions

This document provides basic questions and suggestions for completing these steps.

Step 1: 30-second elevator discussion (need not occur on or near an elevator)

Inquire about performance needs:

- How are you doing on ___? What new things are you doing?

Provide basic information about how FSAU can help:

- Validate need - Acknowledge the performance need as stated
- Establish credibility - Explain what FSAU does, particularly in that area
- Define / Broaden scope - Apply FSAU's offering to the stated need

Step 2: 10-minute follow-up

This update could be offered in a variety of formats, including a phone call, e-mail, or walk-by meeting. Its purpose is to gather more information about the customer's needs and solidify FSAU's role as the appropriate solution provider.

Probe for more information

- Begin by restating the information gathered in the earlier conversation
- "As I was thinking about what we discussed..."

Develop a better understanding of the issues and goals

- What's on the team's agenda?
- What's the situation?
- What are the primary concerns?

Ask high-level interview questions (Answers to be considered for next discussion)

- What is the team's target performance?
- What is the team's current performance?
- What are the gaps/needs?

At this stage, the goal is to encourage the customer to consider these ideas and concepts, to push the customer's thinking about the performance needs. At the end of this discussion, suggest a longer conversation to pursue the topic more closely and thoroughly.



Step 3: 2-hour needs assessment interview

Before proceeding to this phase, it is important to understand FSA University's core services and offerings as well as to know the customer's business. After collecting initial data in steps 1 and 2, conduct an interview with the customer to assemble more detailed information. After this interview, FSAU will propose potential solutions to assist with identified needs.

The needs assessment interview covers, in greater detail, the following areas:

- Target performance
- Current performance
- Gaps between target and current performance, thus identifying areas of need
- Information to identify potential solutions to address performance gaps/needs

What's on the team's agenda?

- Identify the hot-button issues or concerns for the team, organization, or business unit
- Consider the Performance Plan, MIT report, modernization plan, etc.

What is the team's target performance?

- What tasks are most:
 - Critical
 - Frequent
 - Complex
 - Which are the priorities?
- What are the expected outcomes?
- Who is the target audience? (Number of individuals, location, organization)
- What are the audience needs?
 - To be aware of the information
 - Apply the information
 - Make business decisions with the information
- What are your assumptions?

What is the team's current performance?

- Who is responsible for completing these tasks?
- What indicates that these tasks are accomplished correctly and efficiently?
- What are the consequences of completing the tasks incorrectly?

What are the gaps / needs? (If any)

- What gaps exist between how the task should be completed and how it is currently done?
- What is likely to change in the near future (and how extensively)?:
 - Information, process, tools

What are the best means to achieve the target performance/goals?

- What is currently being done or planned to fill these gaps?
- What are the existing training or performance support materials? Does it need to be changed?
- What else might make a difference? What might enhance performance?