

# Performance Consulting and Needs Analysis Form

Question(s)	Notes	Drill Down Questions
Describe the problem statement, performance need, or learning opportunity. Is this a new behavior or an existing behavior?		<i>Try to determine the performance gap. Is this something employees do today? Is it something they will be asked to do differently in the future? What is the gap between current behavior and desired behavior?</i>
What will the employees do differently in the future state versus what they are doing today?		<i>Ask this for each impacted audience group/ role. Identify the different roles and how each role will be impacted differently.</i>
Are there any restrictions or dependencies that could impact the project timeline or solution delivery?		<i>Explain dependencies</i>

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When must the solution be available for implementation?		<ul style="list-style-type: none"><li>• <i>What is driving the requested dates?</i></li><li>• <i>Are the dates flexible?</i></li><li>• <i>What is the impact of not meeting the desired date?</i></li><li>• <i>How urgent is the need? Immediate or can it wait? Can dates be negotiated?</i></li></ul>
What key business priorities does the project support?		<ul style="list-style-type: none"><li>• <i>What are the critical quality goals?</i><ul style="list-style-type: none"><li>◦ <i>If there are multiple audiences and/or goals, what is the most immediate need from your perspective?</i></li><li>◦ <i>If there are multiple goals, prioritize them.</i></li><li>◦ <i>Are their quality or metric score issues prompting the project?</i></li><li>◦ <i>Is it regulatory-driven?</i></li></ul></li></ul>
Are there other projects dependent on the completion of this project? Is this project dependent on the completion of another one?		<i>List out all other projects that could be impacted or could impact your project</i>
What existing project documentation is available for review?		<i>Are there existing training documents or procedures already in place addressing this performance? Where is it located? Would other lines of business have something similar in place to leverage?</i>

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Is existing source content available (leverage) or are SMEs available to provide content?		<ul style="list-style-type: none"> <li>• <i>If content is available: What % complete is it? What % accurate is it? What percentage of the overall project does this available content comprise?</i></li> <li>• <i>Who are the key SMEs?</i></li> </ul>
Is this a new process? Are the changes to new processes/performances: soft skills, instructional, or technical?		<ul style="list-style-type: none"> <li>• <i>If so, when will the process be ready?</i></li> <li>• <i>Is there a process map or analysis showing how the new process compares to the previous process?</i></li> <li>• <i>Does the timeline for the development of the process pose a risk to our ability to deliver by the required date? Links/Attachments - updated information?</i></li> </ul>
Has training/communication been delivered on this topic before? When? What other efforts have been made in the past to address this specific process change or performance change/gap?		<ul style="list-style-type: none"> <li>• <i>Is there existing, ongoing, or future training that addresses the need?</i></li> <li>• <i>Was Global Learning and Leadership developed engaged?</i></li> <li>• <i>If previous training on this topic - what was the result? What worked well?</i></li> <li>• <i>Why the need for new or additional training?</i></li> <li>• <i>What isn't working?</i> <i>Is there any data/results/feedback from previous training that can be reviewed?</i></li> </ul>
If communication is a need, what alternative methods of communication vehicles exist that could get this messaging out?		<ul style="list-style-type: none"> <li>• <i>Is there another routine or practice to address the change, rather than formalized communication? Does the business have existing routines to weave this in?</i></li> </ul>