Training needs analysis template

A training needs analysis template helps you check that training will close a real performance gap before you design a course. This kit gives you a sponsor interview, eight learner questions, a skill-gap matrix with a calculated priority score and a filled example. A 60-minute scoping meeting shows you how to complete them with the people who know the work.

60 minutes | 2–6 participants | Online and adaptable in person

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The outcome

The sponsor and trainer leave the meeting with a one-sentence performance problem, a list of causes that training cannot fix, a ranked skill-gap matrix based on evidence, and one agreed decision with an owner and a measure to check in 60 days.

Before the session

- For trainers, L&D staff and team leads who receive a request for training. The 60-minute meeting brings together the sponsor who asked for it and one to four people who do or supervise the work.
- Before the meeting, collect two or three pieces of existing evidence, such as error reports, quality checks, customer feedback or a sample of work. Ask the sponsor the interview questions in advance if time is short.
- Send the learner questions to three to five people who do the work. Keep answers anonymous and report them as a summary. Treat self-ratings as opinion, not as evidence of skill.
- Share the blank matrix in an accessible, editable format. Use the Excel version on screen if you meet online so the score and rank calculate as you type.

Included in this kit

A facilitator run of show, participant worksheets with real tables, reference tables, debrief questions, adaptation notes and a follow-up plan. Use the editable Word copy to tailor examples and prompts before delivery.

Original material by Superglue. Timings are suggestions; adjust them to your participants. This resource has not been independently evaluated.

What is inside

The participant sheets come first so you can print one page per person. Your own facilitator section follows them.

- Sponsor interview — Ask these questions of the person who requested the training.
- Learner questions — Send these to three to five people who do the work, or ask them in short conversations.
- Blank skill-gap matrix — One row per task.
- Filled example: skill-gap matrix — A fictional 14-person customer support team after a change to the returns policy.
- Prioritisation and decision sheet — Copy the top rows from the matrix in score order.
- Facilitator run of show, reference tables, debrief questions and adaptation notes — for you, after the participant sheets.

Sponsor interview

Ask these questions of the person who requested the training. Write their words where you can. An answer of “I don’t know” is useful; record it and agree how to find out.

Question	Answer
What should people do differently after this, and in which task?	
What happens now, and how do you know?	
What is the cost or risk of leaving it as it is?	
Who does this task, how many people and how often?	
What has already been tried, and what happened?	
What else could explain the problem: tools, workload, unclear rules?	
What result in 60 days would tell you this worked?	

Learner questions

Send these to three to five people who do the work, or ask them in short conversations. Keep answers anonymous and report a summary. Answers describe experience and opinion; they are not a skill test.

Question	Summary of answers
Which part of this task takes longest or needs the most rework?	
When did you last need help with it, and what did you do?	
What information or tool do you use to do it?	
What gets in the way, apart from knowing how?	
Which part can you do confidently without help?	
How often do you do this task in a normal week?	
How would you prefer to learn a change to this task?	
What should a trainer know about your working conditions?	

Blank skill-gap matrix

One row per task. Record evidence before the level. Levels: 1 not yet done, 2 does with step-by-step help, 3 does with occasional help, 4 does independently to standard, 5 can coach others. Gap is Need minus Now; Impact and Freq. run from 1 to 3; Score is Gap × Impact × Freq.

Task or skill	Evidence of the current level	Need	Now	Gap	Impact	Freq.	Score

Filled example: skill-gap matrix

A fictional 14-person customer support team after a change to the returns policy. The sponsor reported refund errors. The numbers are an illustration of the method, not a benchmark.

“Find the current policy page” has a low score and a non-training cause: the old page still appears in search. The fix is to archive the old page, not to add training.

Task or skill	Evidence of the current level	Need	Now	Gap	Impact	Freq.	Score
Issue a refund under the new returns policy	Audit of 40 recent refunds: 9 used the old policy	4	2	2	3	3	18
Record the correct refund reason code	Monthly report: 30% of refunds coded “Other”	4	2	2	2	3	12
Find the current policy page	Search log: the old policy page still appears first	4	3	1	2	3	6
Explain the returns window to a customer	Call review of 12 calls: 10 explained it correctly	4	3	1	2	3	6
Escalate a damaged-goods claim	Team lead notes: escalation form often incomplete	4	2	2	2	1	4

Prioritisation and decision sheet

Copy the top rows from the matrix in score order. Choose the smallest response that will close the gap, and agree how you will know it worked.

Rank	Need	Response	Owner and date	Measure in 60 days
1				
2				
3				

Causes that training cannot fix, and who will act on them

_____

_____

Evidence still to check, owner and date

_____

_____

Facilitator run of show

1 Confirm the performance problem | 10 minutes

Use the sponsor interview. Ask what people should do differently, what they do now and how the sponsor knows. Write the problem in one sentence that names a task and a result, not a course title. If nobody can describe the current result, agree how to find out before continuing.

2 Check causes before choosing training | 10 minutes

Walk through the cause check table. For each cause, ask for an example from the evidence. Record the causes that training cannot fix, such as a broken tool or unclear expectations, with an owner. Continue only with the tasks where a skill or knowledge gap is likely.

3 List the tasks that matter | 10 minutes

Name four to eight tasks connected to the problem. Write each as something a person does, such as “issue a refund”, not a topic such as “returns”. Agree the required level for each task using the five-level scale.

4 Rate the current level with evidence | 15 minutes

For each task, record the evidence first, then the current level. Use work samples, reports and observation before opinion. Add the learner answers as context. Where evidence is missing, mark the row “to check” and give it an owner instead of guessing a number.

5 Score and rank the gaps | 10 minutes

Rate impact and frequency from 1 to 3. The score is the gap multiplied by impact and frequency. Sort by score, then check the top three against common sense: a high score with weak evidence needs checking before you design anything.

6 Agree the decision and next check | 5 minutes

For the top one to three needs, choose a response: training, practice with feedback, a job aid, a process fix or no action. Record an owner, a date and one measure you will check in 60 days, such as the error rate in the same audit.

Reference tables

Filled example: sponsor interview

Fictional answers from the customer support team lead who asked for “returns training”.

Question	Sample answer
What should people do differently, and in which task?	Issue refunds under the new returns policy and code the reason correctly.
What happens now, and how do you know?	Some agents still apply the old 14-day rule. The October refund audit found 9 errors in 40 refunds.
What is the cost or risk of leaving it?	Customers receive the wrong amount, which leads to repeat contacts and manual corrections by finance.
Who does this task, how many people and how often?	14 agents, several refunds each per day.
What has already been tried?	One email announcing the change. No practice and no job aid.
What else could explain it?	The old policy page still appears first in the knowledge base search.
What result in 60 days would show this worked?	Refund errors in the monthly audit fall from 9 in 40 to 2 or fewer.

Filled example: decisions

Rank	Need	Response	Owner and date	Measure in 60 days
1	Issue a refund under the new policy (score 18)	45-minute practice session with five realistic cases, plus a one-page job aid	Trainer, 14 November	Refund errors in the monthly audit
2	Record the correct reason code (score 12)	Add the code list to the job aid and check it in the practice cases	Trainer, 14 November	Share of refunds coded “Other”

Rank	Need	Response	Owner and date	Measure in 60 days
—	Find the current policy page	Archive the old page. No training.	Knowledge base owner, 3 November	Old page no longer appears in search

Is training the right answer?

Check each cause against the evidence before you design a course. More than one cause can apply.

Possible cause	What you might see	Better first response
Skill or knowledge gap	People cannot do the task correctly even when they have time, tools and clear instructions.	Training or practice with feedback.
Unclear expectation	People do the task differently because nobody agreed the standard.	Write and share the standard; then check.
Tool or process barrier	The system, form or process makes the correct action slow or impossible.	Fix the tool or process.
Missing or outdated information	People follow old guidance or cannot find the current version.	Update and remove old sources.
Rare task	People did it correctly once but forget between occurrences.	A job aid or checklist at the point of use.
Competing priorities or workload	People know how but have no time, or other targets reward something else.	Discuss with the manager; training will not change it.

How the priority score calculates

Column	What it means	Values
Need	The level the task requires in this role	1–5
Now	The current level, based on the evidence recorded	1–5
Gap	Need minus Now; zero if people already meet the need	0–4
Impact	Consequence of doing the task wrong: 1 minor, 2 noticeable, 3 serious	1–3
Freq.	How often the task happens: 1 monthly or less, 2 weekly, 3 daily	1–3
Score	Gap × Impact × Freq. A ranking aid for discussion, not a formal assessment	0–36

Debrief and next steps

Questions for reflection

- Which part of the problem would remain even after perfect training?
- Which score rests on the weakest evidence, and how will you check it?
- What is the smallest response that could close the top gap?

Adapt the session

- With only the sponsor available, complete the interview and cause check in 20 minutes, then fill the matrix after you have collected evidence and learner answers.
- For a large or regulated programme, use the matrix for one role at a time and add a column for the source of each required level, such as a procedure or standard.
- Online, share the Excel workbook on screen so the score and rank calculate as people talk. Read each row aloud and accept typed contributions in chat.
- Keep individual names out of the matrix. It describes a role or group, not a person. Do not use it for performance ratings, pay or selection decisions.

After the session

Put the 60-day measure in the calendar with its owner. After the response, compare the same evidence source with the baseline you recorded, for example the next monthly audit. If the gap remains, return to the cause check before adding more training. File the completed template with the course design so the next trainer can see why the course exists.

Questions people ask

What should a training needs analysis include?

Include the performance problem, the evidence for it, the causes that training cannot fix, the tasks and required levels, the current levels with evidence, a way to prioritise the gaps, and a decision with an owner and a measure. This template covers each of these in one sheet or table.

How is a training needs analysis different from a skills matrix?

A skills matrix records levels for a team or a person over time. A training needs analysis starts from a specific problem and asks whether training is the right response. This kit uses a skill-gap matrix inside the analysis, together with the sponsor interview and the cause check.

How does the priority score work?

The score multiplies the gap (0–4) by impact (1–3) and frequency (1–3), so the maximum is 36. It is a ranking aid for discussion. Check the evidence behind a high score before you act on it.

Can I do a training needs analysis without a survey?

Yes. Existing evidence such as audits, quality checks and work samples is often more reliable than a survey. Short conversations with three to five people who do the work can replace the learner questionnaire.

Is this a formal competency assessment?

No. The template supports a decision about training for a role or group. It is not a validated assessment and should not be used to rate, pay or select individual employees.

What is included in the free and editable files?

The open PDF includes the sponsor interview, learner questions, blank and filled skill-gap matrix, prioritisation sheet, cause check and the 60-minute meeting plan. Subscribers also receive the editable Word file, an Excel workbook that calculates the gap, score and rank, and a CSV of the meeting plan.

Use and sharing

Free to use and adapt in your own training sessions, including paid client work. Do not resell or redistribute the unmodified download as a standalone product. Share the resource page instead.