Rapid Analysis:
Before you begin, know the ANSWER

By Ben Hughes

Do any of these situations seem familiar to you?

Situation 1: Acquisition
Your employer has decided to acquire a company with more than 5000 employees. These new employees should not complete the two-week orientation training you provide to new hires who do not have experience in the industry, but they will need training as they become a part of your company's unique culture and as they fill new roles and learn to use your company's proprietary information systems. ***You need to present a plan to senior management by the end of the week. How can you quickly analyze the needs of the learners and design a blended solution that will meet their needs?***

Situation 2: Leadership Development
Over 200 promising leadership candidates have been identified within the various business units of your organization. Many of these candidates need to be ready to accept leadership positions within the next two to five years. ***What can you do now to make sure your training will meet the needs of your audience, and how will you measure the success of your program?***

Situation 3: Manufacturing Quality
Your swing-shift employees are producing work that is significantly below the quality standards met by your other shifts. ***You suspect training will not provide the entire solution to the problem. You need to validate your opinions and put together a plan that will help you work with other business leaders to make a change, fast.***

Training professionals are asked every day to help address many of the most challenging issues facing their organizations. Solving these issues requires making informed decisions fast and knowing how to design the best blended solutions. The leading writers in the

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training and performance improvement industry agree that the questions training professionals ask before developing training can have the greatest impact on the success of any training-related initiative. Before you begin, you need to know the ANSWER.

At Allen, we have developed a rapid performance and needs analysis method, called an ANSWER Analysis, for leading training teams through discussions of the most important issues to consider before beginning large initiatives. After reading this paper, you may find elements you would like to include in your approach to rapid analysis within your organization.

Depending on where you are now, using all or part of our ANSWER Analysis can increase your ability to influence real changes in your organization and develop solutions that are perfectly suited to the needs of the learners who work within your unique environment. You can become the internal performance consultant who helps your internal clients understand exactly how training fits within the larger picture and how they can help implement systematic improvement.

When is an ANSWER Analysis appropriate?

As with any tool in the training professional's toolkit, the ANSWER Analysis is only valuable if it helps you solve real performance issues. This approach can improve the upfront analysis of any performance issue, but it is especially valuable when:

1. You have a large and complex opportunity, or
2. You have a new type of project and you need to identify the best first steps, or
3. You are early in the project-scoping process (pre-RFP) and you need to develop a high-level design before you choose how to implement it.

How is it done?

The ANSWER Analysis is based on the latest approaches in rapid performance and needs analysis

A udience

N eeds

S uccesses

W eaknesses

E xisting content & expertise

R esults

and our experience helping customers satisfy learning needs since 1981. ANSWER stands for Audience, Needs, Successes, Weaknesses, Existing content and expertise, and Results. The analysis is done in three steps:

1. Scan existing documentation
2. Facilitate the ANSWER Analysis session
3. Produce the report

Typically, the entire engagement can be completed in two weeks or less.

SCAN EXISTING DOCUMENTATION

Before conducting an ANSWER Analysis session, talk to the project sponsor/decision maker and scan any existing documentation and literature related to the

ANSWER Analysis Action Items

- *Scan existing documentation*
- *Facilitate the ANSWER Analysis session*
- *Produce the report*

performance issue. This documentation may come in a variety of forms such as:

- Existing training materials
- Job descriptions
- Organizational charts
- Anecdotal or quantitative data regarding the learning population
- Meeting notes and presentation slides related to the initiative
- Policy manuals, Standard Operating Procedures, etc.
- Industry literature related to the initiative

The goals of this step are for you to gain a general understanding of the information surrounding the initiative and to get a sense of how comprehensive and stable the content source material may be for training developers. During the ANSWER Analysis session, you will report on your review of any existing material. Taking a short time for this step allows you speak more conversationally about the issues surrounding this initiative, and you may find information and ideas that your group of stakeholders and subject matter experts (SMEs) have not considered.

FACILITATE THE ANSWER ANALYSIS SESSION

The session is a structured, collaborative, and engaging meeting that gives participants an opportunity to share their unique perspectives related to the initiative. As a result, the blended approach you design will have a greater chance of correctly identifying and meeting the needs of your learning population, and your participants will share a sense of ownership in the final program.

Who should attend?

The most effective sessions include the training director and/or manager, leaders from the business units involved in the initiative, instructional designers, SMEs, and at least one representative of the learning population. Having the right people in the room directly affects the breadth of experience that shapes the decisions you make as a result of this session. And, because the decisions you make will be based on the findings from this meeting, it is critical to have a variety of perspectives.

Often, the training director will have a member of senior management meet with the participants near the end of the session while the findings from the session are displayed on flipcharts around the room. This gives senior management a first-person view into the work that was accomplished during the session, and it prepares him or her for future discussions of the initiative.

If senior management is not involved, the report delivered after the session can be a valuable tool for any follow-on discussions with senior management or other stakeholders, decision makers, or opinion leaders.

What happens during the session?

The ANSWER Analysis session is a high-energy, creative, and unifying event that helps the training team and stakeholders build a shared understanding of the performance issue and make informed decisions about the blended solution. The key ingredients for a successful session are:

- Participants with dedicated time to meet (between four and twelve hours, depending on the initiative. Multiple audiences and highly technical or larger group sessions can take longer than four hours).
- A meeting facilitator who is objective and can guide the participants effectively
- A room with flipcharts, markers, and space for people to move around

The following table describes how we conduct sessions. While the session follows a pre-defined structure and includes a series of planned activities, a skilled facilitator can add some flexibility to the session based on the needs that he or she perceives during the meeting. And you may have specific activities to add to the agenda to fit within your existing methods for this kind of analysis.

		Facilitation Description
	Define the Context • What is the nature of the problem? • Can we apply fast fixes? • What are the expectations for the performers, and are they clearly communicated? • Do the performers have the resources they need to complete the task? • Are consequences appropriate? • Is there, or could there be, a genuine skill or knowledge gap? (Mager, 1997) • Does this opportunity appear to fit the classification of a rollout, a problem, people development, or strategy development? (Rossett, 1999)	**Discussion: Define the Context** The facilitator leads the group through a discussion of the context using lines of questioning influenced by accepted performance analysis methodologies. (Mager, 1997) and (Rossett, 1999)
A	**Audience** • Who are your learners? • How does their work environment affect their level of performance and the types of learning activities that are feasible? • What motivates these learners to learn and to apply new knowledge and skills on the job? • How are their professional goals related to this initiative?	**Presentation: Why consider the audience?** The facilitator delivers a short presentation on the purpose and goals of an audience analysis. This includes a discussion of learner motivation. **Activity: Describe your Learner** The facilitator uses a prepared flipchart to lead the group through a discussion of audience characteristics and factors that influence learning/performance motivation.
N	**Needs** • What needs are present that are related to this performance improvement initiative? • Identify, discuss, and prioritize needs that are best met by training and a combination of coaching, policy/role changes, tools and job aids, and workplace changes.	**Presentation: Need Identification** The facilitator delivers a short presentation on identifying needs (learning and other performance-related types). **Activity: Listing Needs** The facilitator conducts an open-ended brainstorming session to list needs. Then, the needs are consolidated and numbered. **Presentation: Need Classification** The facilitator delivers a short presentation on the classification of needs in terms of environment, motivation, skills/knowledge, and incentives. (Rossett, 1995) **Activity: Classifying and Finishing List of Needs** The facilitator reviews the list of needs with the group and classifies them appropriately. Once they are classified, the group can talk broadly about which needs can be met by training and which must be met entirely or in part by changes to the environment, policies, role definition, resources, incentives, etc.

	Facilitation Description
S **Successes** • What has worked well for your organization in the past? • What unique strengths exist in your organization that should be leveraged for this initiative?	**Presentation: Learning from Success** The facilitator delivers a short presentation on learning from past successes in the organization. This is the first of two sections of the session that uncover the unique characteristics of the organization that will affect the final solution. **Activity: Success Stories** The group tells success stories of how similar performance problems have been resolved in the past and what other training initiatives have worked well for this audience. The facilitator writes headlines that describe each story on the flipchart and summarizes these stories in the notes.
W **Weaknesses** • What has gone wrong in the past? • What lessons have you learned that will affect the approach you take with this initiative?	**Presentation: Exposing Weaknesses** The facilitator delivers a short presentation on learning from weaknesses in previous training initiatives that have not worked well for this audience. **Activity: Stacking the Deck** Participants write responses on 3x5 cards with headlines and stories of weaknesses from previous initiatives. The facilitator talks through the responses on the cards and tapes them to the flipchart for listing weaknesses.
E **Existing content and expertise** • What raw material, instructional content, and information do you have that will help move this project along efficiently? • What content gaps do you know about now? • Who in your organization can help to analyze and confirm the accuracy and completeness of the content? • What action items need to be assigned immediately in order to gather, analyze, organize, confirm, and modify existing source content or to generate it in collaboration with subject-matter experts?	**Presentation: Evaluating Existing Content** The facilitator summarizes preliminary findings discovered from scanning existing documentation and literature related to the performance issue. **Activity: Rapid Content Inventory and Analysis** The participants list any additional material that should be considered as the performance issue is addressed. The facilitator leads the group through a discussion and classification exercise to quickly analyze the source content.

R **Results**

- How can you prepare now to gather evaluation data to measure the results of this initiative?
- What performance data is currently gathered that can help you show the impact of this program with credible business-focused metrics?

Facilitation Description

Presentation: Levels of Evaluation
The facilitator delivers a short presentation on Kirkpatrick's four levels of evaluation and discusses how each level is typically measured. (Kirkpatrick, 1998)

Activity: Three Charts
The facilitator uses three prepared flipcharts to lead the participants through a discussion of 1) Measuring success relative to the needs, 2) Identifying current business metrics that could be used for training evaluation, and 3) Summarizing the training evaluation plan.

PRODUCE THE REPORT

Before you can act on the discoveries and decisions made during the session, you must document them. Immediately following the meeting, the notes should be synthesized into a report that you can use as you work on the initiative. This brief report often includes:

- Documented findings from the session
- Recommended Blended Solution Design (classroom, web-based, live and self-study, learning portal, discussion threads, blogs, podcasts, simulations, mentor or apprenticeship programs, etc.)
- High-level training course evaluation plan (based on Kirkpatrick's four levels of evaluation with a special emphasis on ways to show credible business results)
- Discussion points and questions for working with your technical team to conduct a feasibility analysis
- Action Items to help launch the first phase of the project

The report should be delivered within a week after the session and can be a valuable tool as you establish the timeline for the project, work with stakeholders to generate support, secure internal resources, develop an RFP for vendor candidates, or begin an expanded needs analysis and curriculum design project.

What are the limitations of the ANSWER Analysis?

Because the ANSWER Analysis is centered on a single meeting with a smaller group of people, it does not replace longer, more formal analysis activities that may include reviewing a larger collection of existing data or literature, meeting with a larger population of subject-matter experts, conducting focus groups and interviews, online surveys, job performance observation, user testing, technical feasibility analysis, etc.

Depending on the complexity and business implications of your training initiative, you may choose to follow the ANSWER Analysis session with some additional data-gathering activities. Additional analysis incorporating a larger pool of data can help you validate the assumptions made during the ANSWER Analysis and further refine your approach.

Regardless of the time you choose to spend on additional analysis activities, the ANSWER Analysis session is the best first step. You may find that by having the right people in the room at one time, your shared view of the performance issue is right on the mark.

	ANSWER Analysis	With an Expanded Needs Analysis
Strengths	• Fast • Immediate, shared understanding of the audience, needs, lessons learned, and overall scope and approach for completing the performance initiative • Assumptions and ideas are shared and evaluated by all of the key stakeholders at the earliest opportunity • A high-level blended design is created after considering all of the right factors • Action items are identified to help the team take immediate action	• Not as fast (but doesn't have to take long) • Gathers data from a more diverse set of sources (surveys, focus groups, interviews, deeper review of existing documentation, user testing, observation, etc.) • Allows validation of findings and decisions from the ANSWER Analysis
Limitations	• Depends on having the right people in the room for the session. All of the stakeholders in the performance initiative should be in attendance or have a decision-making representative present.	• Requires more time and funding

Conclusion

An ANSWER Analysis is a perfect way to start any new performance improvement initiative. It gives training professionals a structured method for conducting a rapid performance analysis by engaging stakeholders in a collaborative and creative way. Consider the scenarios you read at the beginning of this paper. Here are some discoveries that were made because of an effective ANSWER Analysis:

Situation 1: Acquisition
The session included members of the leadership teams that would absorb the new employees and top performers from both companies who worked in the key roles that would require training. During the session, the employees from the new company helped everyone understand the background and experience of the audience better, and the training team was able to discuss their initial review of the existing documentation and work with the group to identify which sections of the source material would be used for training. The overall blended solution included:

- A learning portal with immediate access to documentation and job aids customized to the incoming employees
- An executive video podcast explaining how the acquisition would impact front-line employees
- An instructor-led program offered in the classroom and online for members of the leadership teams
- A short web-based self-study module for all employees

The entire plan was sketched out during the session and presented to senior management by the end of the week. The project was off to a fast start and was on the right track from the beginning.

Situation 2: Leadership Development
Members of the organizational development team

met with key stakeholders from the business that units expected rapid expansion within the next few years. The session also included two leaders who had been promoted into their positions within the last five years. The company had an existing competency model for leaders that they had used to identify promising candidates. During the session, the more and less experienced leaders prioritized the competencies that were most important to the business units expecting the largest growth, and the organizational development team came away with a much clearer picture of the future state of the company.

The blended solution included:

- Seminars with retired industry leaders
- Peer leadership projects for candidates to complete and present to senior leadership
- A refined mentorship program that offered additional training as an incentive for effective performance in each candidate's current role

Situation 3: Manufacturing Quality

Shift managers and supervisors met with members of the training department. During the session, the ANSWER Analysis revealed that the maintenance team was spending more time than expected working on repair projects and routine maintenance of some critical equipment was falling behind. The day shift operator was compensating for the faulty calibration of the equipment, and the swing shift operator was not. This was causing a number of failures later in the manufacturing process.

The solution involved:

- Reassigning a member of the maintenance team to assist the swing shift crew for the next two months
- Assigning the training team to work with the day shift operator and a member of the maintenance team to learn how other operators could recognize and compensate for calibration problems in the future

In this scenario, the problem was solved within a week of the ANSWER Analysis session.

If you're facing a situation similar to those above, we highly recommend starting out with a rapid analysis like the ANSWER Analysis. It could be the difference between a successful or unsuccessful learning engagement. If you need help or pointers on best practices for rapid analyses or the ANSWER Analysis method, give us a call and we'll help you get started.

Ben Hughes is the Lead Consultant at Allen Communication. As a trainer, writer, and multimedia instructional designer, Ben has taught leadership, sales, and technical skills to thousands of employees throughout the United States. Ben uses real-life stories and rich simulations to teach key lessons in expert decision-making. He has worked with subject matter experts from a variety of disciplines to gather best practices, design realistic teaching scenarios, and reduce the number of common errors made by novice employees. Ben has presented at a number of industry conferences on cognitive task simulations, using stories to teach, using humor and metaphor, and designing blended learning solutions. The leadership course he developed for Rockwell Collins, titled "Making History: A Personal Leadership Adventure," received an Excellence in E-learning Award from Brandon Hall.

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