**Sample Needs Analysis Survey Template**

*Customize this template to identify stakeholder perceptions, expectations, and actual versus perceived practices.*

1. Use the sample survey\*, below, as a template for your investigation of what people know should be done and what is actually occurring in your organization. Adjust the statements to include details specific to your organization and environment. It is a good idea to include statements that describe practices and behaviors that key leaders have identified as important to the success of the organization.
2. Have different groups within the organization take this survey and then compare their answers. Instruct respondents that the first column is asking for their *opinion* on the practice and the second column asks for their *observation* of whether that practice is actually occurring in the organization. Record the name and/or the position and contact information of each person who completes the survey to facilitate follow-up questions, but consider whether this information should be kept anonymous in your needs analysis report so that respondents feel free to be honest in their answers.
3. Identify differences in expectations and perceptions, particularly between leaders and others in the organization. Compare stakeholder expectations and perceptions with your own observations to identify misconceptions.

| **What *SHOULD HAPPEN* in the organization?**  **(Practices/behaviors described by those interviewed)** | **What *ACTUALLY HAPPENS* in the organization?**  **(*Is the statement true for the organization?*)**  **1** = Strongly disagree  **2** = Disagree  **3** = Agree  **4** = Strongly agree  **0** = Don’t know if it is true or not | **What is the *IMPACT* of the presence or absence of this practice/behavior?**  **1** = Negatively impacts performance  **2** = Has no effect on performance  **3** = Has some positive impact on performance  **4** = Has a very positive impact on performance  **0** = Don’t know how it impacts performance |
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| 1. We set high but realistic goals for performance. |  |  |
| 1. Our financial performance is shared with all employees in an “accessible” and easily understood format. |  |  |
| 1. Managers share good ideas across the organization. |  |  |
| 1. We “cross-train” our employees so they are able to do each other’s jobs. |  |  |
| 1. We post all job adds internally first. |  |  |
| 1. The hiring process for potential employees is rigorous and metric-based. |  |  |
| 1. Our employees are given instruction on effective teamwork. |  |  |
| 1. Our employees exhibit good teamwork. |  |  |
| 1. We regularly solicit and consider new ideas and ways to do things better from our employees and clients. |  |  |
| 1. Local and divisional leaders are given the freedom to mindfully decide whether or not to apply some of the corporate policies, practices, and resources. |  |  |
| 1. We often try new ways to motivate and reward employees. |  |  |
| 1. We protect our employee training and development programs so that they are not the first things cut when reductions are necessary to the organizational budget. |  |  |
| 1. Management evaluations include input from peers and subordinates. |  |  |
| 1. We frequently provide employees with both formal and informal constructive feedback on performance. |  |  |
| 1. Employees at all levels are encouraged to follow the example of top leaders by talking openly about their mistakes and the lessons learned from those mistakes. |  |  |
| 1. Our salaries and compensation packages are at or above the average for similar jobs in our industry and locale. |  |  |
| 1. We conduct orientation and on-going training that ensures that our employees understand the organization’s mission, goals, and operations. |  |  |
| 1. We encourage employees to dialogue with management concerning their work practices and if their plans do not hamper the productivity of others, we allow them to change how they accomplish their work. |  |  |
| 1. Our managers encourage their subordinates and readily contribute to efforts to accomplish a task when subordinates are temporarily overwhelmed. |  |  |
| 1. We have identified key aspects of our organizational culture and make hiring, transfer, and promotion decisions on the basis of the applicant’s abilities and fit to the culture. |  |  |
| 1. Employees carry out job tasks according to the procedures and quality criteria identified in company documentation and training materials. |  |  |

\* This survey template is based on recommendations and information in:

Pfeffer, J., & Sutton, R.I. (2000). *The knowing-doing gap: How smart companies turn knowledge into action*. Boston: Harvard Business Press.