



2.1 | Create: A Streamlined Needs Analysis Checklist

This is a copy of Table 2.9, a “Checklist for Needs Analysis,” from Streamlined ID (2027).

A STREAMLINED CHECKLIST: NEEDS ANALYSIS

Customize this needs analysis checklist for your projects, selecting those questions that are applicable to the project needs, constraints, and resources. Adjust the wording based on the nature of the project and the sponsoring organization. Compare and verify results of your analyses of people, data, documents, and things.

NEEDS ANALYSIS:

- ☐ What is the problem that needs to be solved in the organization, and what do you think has caused or contributed to it?
- ☐ How do you think the problem should be solved?
- ☐ How would you describe the current situation (“what is”), the desired situation (“what should be”), and the gap between the two (the needs)?
- ☐ What will it look like when this need is met successfully? What results are you expecting? What should the proposed instruction accomplish for the organization and for the learner?
- ☐ Who is the primary audience/learner for the instruction/training/learning experience?
- ☐ What should the learner know, be able to do, and what attitudes should they exhibit after the instruction?
- ☐ What non-instructional needs could impact the effectiveness of the instruction and the project success?
- ☐ What non-instructional needs should be considered, such as learner safety, privacy, accessibility, or representation?

CONSTRAINTS ANALYSIS:

- ☐ How would you prioritize these three factors for this project: low cost, high quality, and timely completion?
- ☐ What budget, schedule, and milestones have been established for this project?
- ☐ Are there established communication or delivery platforms or currently available technology that should be used? What connectivity and bandwidth do learners have?
- ☐ Have you already made decisions concerning the format of the instruction: f2f, online, blended? Self-paced or collaborative? Synchronous or asynchronous? Etc.
- ☐ Are there any constraints? Geographically dispersed learners? Time zones? International students? For how the instruction is designed? For reliable technical and logistical support? For bandwidth and connectivity?
- ☐ Are there standards, certification or regulatory requirements, or organizational guidelines that must be addressed in the instruction?

RESOURCE ANALYSIS:

- ☐ What human and non-human resources are available to develop and deliver instruction?
- ☐ What facilities, equipment, software, supplies, and services are available?
- ☐ Is there technical support available?
- ☐ What is the SME availability for development, review, and testing of the instruction?
- ☐ Who will review the instruction for accuracy, completeness, and appropriateness? Who is ultimately responsible for approving the instruction?