

# Winning Trainer

*Series of Winning Articles for Trainers*

## Success in Needs Assessment Interviews

By

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# Success In Needs Assessment Interviews

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Every year companies spend millions of dollars on consulting projects that do not achieve the desired results. One reason the projects fail is that all too often the organizations, and the consultants they engage, overlook the importance of identifying exactly what is needed before they begin their work. It's ready, fire, fire, fire, and no aim at all.

A needs assessment can prevent a quick fix, bandage approach to business problems. A good assessment will help ensure that the solution addresses the real problem, and effectively focuses resources, time and effort.

There are many ways to do a needs assessment, depending on the issue the client is dealing with, the type and level of the consulting you'll be doing. You'll probably do several, including:

- Research the company and industry to determine trends and problems.
- Review records (e.g., quality and production records, exit interviews, performance reviews).
- Administer a written survey (self designed or customized generic).
- Conduct benchmarking to determine best practices (internal or external).
- Observe workers and meetings.
- Interview employees, managers, executives, perhaps even vendors and customers.

Chances are, no matter what else you do, you'll do some interviews. So, for this discussion, we'll focus on conducting needs assessment interviews. Here are some factors to help you get the best information.

## Plan the interviews.

Begin by reviewing your overall plan for data collection. Decide who should be interviewed (which levels, which people, whether it will be representatives or everyone). Decide who should do the interviews. Then decide the time frame in which it will be done, considering the schedules of the project, the organization, and the interviewees. Decide how much information you'll collect, and whether you want to interview people alone or in focus groups.

### Before the interview:

**Schedule the interview.** Contact interviewees well in advance of the interview. Give them some choice of times if it's possible.

**Send an agenda.** Indicate your purpose, and describe logistics information like time, duration, location, and whatever else will help them feel comfortable. It's also helpful if you can prepare or think about their answers.

**Clarify confidentiality.** Many consultants prefer not to be told information the interviewee wouldn't want shared. If you choose to offer confidentiality, tell interviewees if information will be summarized but not attributed. If you are using focus groups, the participants must understand the importance of not divulging what they learned in the session. Confirm the client's policy for reporting legal violations.

**Ensure privacy and remove distractions.** While you might think this is a given, in today's "cube" environment, it can take special arrangements to have privacy for an interview. Emphasize the importance of the interview with the interviewee, and with those who might interrupt or distract.

### During the interview:

**Orient the interviewee, and make them comfortable.** Explain the overall objective of the project to the extent that you and the client have agreed is appropriate. Generally, the more candid you can be about the purpose, the better information you will get.

Explain the entire data collection process. Tell the interviewee what information you will record, and what you will do with the information. Tell them what feedback they will get on the information gathered, when, and in what format. Give them refreshments if you can.

**Clarify and confirm.** Your questioning and listening skills will determine your success. Balance open, closed, analytical and clarifying questions so people have room to express their information and priorities without feeling grilled or led.

Clarify carefully if an interviewee rambles or talks in generalities. Get examples. Make sure you understand just what they are saying and not saying. Summarize key points to confirm your understanding.

**Respect their time.** Ask your questions, record the information you need, and get them on their way. Both they, and the client who pays for their time, will appreciate that.

**Record additional action items.** In the course of interviews you may hear of things that need immediate attention. If it's something in your control, do it right away. If not, do what you can to ensure it gets done. Prompt action will help employees feel their opinions are valued, and increase willingness to participate in the future. Follow up carefully.

### **After the interview:**

**Summarize the data.** With unstructured interviews, this could be a major transcription effort. For check box interviews, data entry is easier. Reminder – lock all records up securely. Interview data can be intriguing for curious employees.

**Identify key themes.** This is a creative and important part of the needs assessment process. Plan to allow yourself enough time to do this as well – to draft it, and then think about it, and perhaps review it with others before you report it. Review your interview notes one more time when you think you're done, looking for ideas that are clearer now that you see the themes.

**Remember it's qualitative data.** Interviews are data, but they are not statistics. Resist the temptation to assign too much weight to the numbers that come from them. It's a thermometer, not a cat scan.

**Make it graphic.** Charts can provide graphic pictorial summaries of the trends and themes in the data you've collected. You can also make your final report interesting with colorful quotes direct from the interviews. They are anecdotal but powerful information.

The needs assessment process in general, and interviews in particular, may take time, but it is the only way you can ensure the consulting you do is exactly what was needed.

With good needs assessment, and especially with excellent interviewing, you'll uncover the real issues of the organization. You'll reduce trips down blind alleys. You'll save money, time, and employee good will in the long run. And all that will increase the likelihood that the client will want to work with you in the future.

## About the Author

*Karen Lawson, PhD, CSP, is an international consultant, executive coach, speaker, and author. She has built a successful organization and management development consulting firm working with Fortune 500 companies as well as small businesses. Dr. Lawson specializes in cultivating outstanding leaders who enable their organizations to outperform the competition. For a complete list of her products and services, contact Lawson Consulting Group, Inc. at 215-368-9465 or at [www.LawsonCG.com](http://www.LawsonCG.com).*

## Growth Resources

### Books

The Trainer's Handbook, 2nd Edition  
50 Communication Skills Activities  
New Employee Orientation Training  
Improving On-the-Job Training and Coaching

### Growth Tools:

Self-Assessments  
Audio CDs and Tapes

## Links to Exceptional Resources

Please go to these exceptional resources:

### Solutions:

Lawson Consulting Group's Main Website  
Training and Consulting Tools - Self Assessments  
Leadership Solutions: Cultivating Truly Outstanding Leaders  
Executive Coaching and Leadership Coaching  
Training the Trainer: Even Trainers Need Training!  
Career Development: For Organizations and Individuals  
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