

Finding Out What Managers Need

You may have often helped managers assess the needs of employees in their departments. But have you ever used assessments to help managers determine what they need to do their own jobs better?

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Fierce competition among firms is forcing managers into increasingly complex roles. They have the burgeoning responsibility for effectiveness and efficiency, sales and research, profits and growth, competition, government regulations, and future markets and services. The complicated demands being placed on managers have magnified the importance of monitoring their needs and have propelled managerial needs assessments to the forefront of organizational priorities.

Managerial needs assessments involve anticipating, researching, and evaluating the needs of the management staff. By identifying gaps between present and desired situations, they help point out ways to improve management's effectiveness. This is done by first using measurement tools to define problems, then judging the importance of data gathered to determine priorities for program planning, organizational development, and management development. The responsibility for performing these assessments usually lies with the personnel or training staff.

Managers often can use needs assessment in establishing priorities, meeting

budgets, maintaining policies that promote results, and obtaining the necessary resources to achieve results. However, this assistance has generally not been available. Even when it was available, managers frequently rejected it; they did not see how the results would benefit them in their day-to-day functions. Many organizations have only recently accepted managerial needs assessments as valuable tools in protecting against factors that negatively affect managers' performance.

A managerial needs assessment system can provide early warnings of these negative factors and facilitate organizational development. The needs assessments should not be performed as reactions to critical situations. They should be performed either continually or in response to identified present or potential needs and problems.

A major problem that frequently occurs when needs assessments are conducted is that data are not integrated into the organization's entire planning process. The approach used to assess needs must take the realities of organizational life into consideration. It must contemplate organizational policies, politics, and work flow to be truly useful.

When properly executed, needs assessments help unite an organization with its members. In his 1974 book, *Management*, Peter Drucker indicated that within 10 years businesses and industries would be far less concerned with managers' development as a means of adapting individuals to organizational demands. He predicted instead that a greater emphasis would be placed on adapting organizations to the

needs, aspirations, and potentials of individuals in a continuing effort to enhance management development. If this position is supported now at a company, managerial needs assessments can identify ways to link individual and organizational goals.

Properly performed assessments also allow organizations to peer into the future by researching what lies within employees' minds. Extracting this critical information is an arduous task. Designing the assessment tools requires a tremendous amount of creative effort. But it is well worth it. Assessment data, when appropriately analyzed, can be used not only to identify training needs and performance problems, but also to enhance management and career development.

Developing the assessment strategy

Answers to the following questions can provide the guidelines for a managerial needs assessment strategy. These questions can be used whether the assessment is conducted internally or by an external consultant.

- What mechanisms are currently in place to disclose business problems?
- Does documentation exist from previous needs assessments?
- What departments within the corporation will be involved in the needs assessment process?
- Which employees will be involved in the process?
- What budgeted amount is available to pay for costs incurred in the needs assessment process?

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- What time frame does the needs assessment have to be conducted within?
- What is the relationship of the needs assessment to the corporation's overall strategic plans and the strategic plans of its departments?

A final consideration in strategy development is the method to be used for the assessment. Some criteria for choosing a method are amount of employee and management involvement, time required, cost, and relevance of data gathered. Following are several methods that can be effectively applied to a managerial needs assessment.¹

■ **Advisory committees**—Committees are established to identify training needs, determine whether the problem might be solved via training or in a different manner, and prioritize the needs. The purpose is to provide advice only, not to make decisions. An important side benefit of the committee approach is the generation of enthusiasm from its members for program participation.

■ **Assessment centers**—The assessment center technique usually takes several days. Participants engage in a variety of tasks, such as inbasket exercises, decision-making simulations, case analyses, psychological tests, and group discussions. Trained observers assess candidate behavior, record their impressions in detail, and combine their appraisals into a formal report. Two kinds of conclusions typically are generated, dealing with the person's perceived promotability and suggestions for further development.

■ **Attitude surveys**—An attitude survey is an opinion poll soliciting managers' feelings about a range of organizational and work-related issues. Such a survey can have open-ended questions with narrative responses, or structured questions with more objective responses. Because the topics covered are usually general, the data gathered are more useful for indicating general levels of satisfaction than for generating valid conclusions regarding specific training needs.

■ **Group discussions**—This technique involves a series of meetings with managers to crystallize specific problems, analyze their probable causes, and identify areas in which training could be of value. Because of its limited structure, this technique works best for preliminary needs analyses or where more rigorous analytical approaches are not feasible.

■ **Interviews**—Some trainers individually interview managers to obtain their perceptions of work problems and of areas in which they feel they need training. Inter-

views offer high participant involvement and the capacity to tailor the training solution more directly toward individuals. However, the technique is quite costly in terms of the trainer's time.

■ **Behavior observation**—Direct observation of managerial behavior can be done with work tasks or simulated exercises, and can be conducted by either the trainer or other supervisory personnel. This method can be time-consuming, costly, and too passive. However, it is beneficial in its direct focus on job skills and behaviors.

After all the strategic questions have been answered, the information can be translated into a formal needs assessment plan: (1) establish the goals and objectives of the needs assessment; (2) identify specific research questions that need to be answered; (3) examine time and cost constraints; (4) consider various sampling strategies; and (5) review data collection and analysis techniques.²

Once the plan is completed, implementation of the assessment can begin.

Implementing the assessment

The first step to take in conducting the needs assessment is to secure information from those in leadership positions. These individuals, referred to as key informants, possess special knowledge of a problem, the context within which it exists, and the people it affects. In addition, they usually are aware of unique situational factors that may relate to the assessment findings. By virtue of their positions, these individuals often know what developmental or competency needs exist within the organization.

Interviews with key informants should yield qualitative data that can be content analyzed. If quantitative data are collected, they are summarized and statistically analyzed. A summary of these findings is then reviewed by all responsible parties in order to determine whether or not additional information is needed. More often than not, key informant interviews by themselves do not provide sufficient information for the needs assessment. Information collected during this initial phase of the needs assessment can also be obtained through advisory committees, observations, assessment centers, or several other techniques.

During the second phase of the needs assessment, the information gathered earlier is reviewed and validated by a structured group or a leaderless group. Group participants include recognized experts, as well as managers of the departments that

may be affected by the assessment results. While the experts can validate the information, the managers can provide data representing the perspectives of their departments. Both groups of data can then be compared to and integrated with the key informant findings.

Depending on the perceived validity of the collected information, a decision can be made as to whether or not additional assessment efforts are necessary. It is not necessary to continue the assessment process if a valid, informed decision can be made at this time. However, if a substantial discrepancy occurred among structured group sessions or between small groups and key informant interviews, further assessment is needed.

After data are gathered and organized, they must be disseminated to the appropriate managers. The managers can then begin to integrate these findings into their overall operation as an initial step toward maximizing their productivity.

The managerial needs assessment is a complex process. It requires using many methods to gather a variety of data from numerous sources. The most difficult part is not identifying managerial skills and needs, but rather aligning the assessment process with organizational operations.

Managers serve as the nerve center of the organization. Consequently, the most effective method for keeping an organization healthy is to maintain its managers' welfare. Assessments that keep close watch on managerial needs can enhance managers' work beliefs and actions, and promote organizational progress.

References

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