

"IS IT POSSIBLE THAT TRAINERS SPEND ENTIRELY TOO MUCH TIME 'DOING' (CLASSROOM TRAINING), AND ENTIRELY TOO LITTLE TIME CONCEPTUALIZING (NEEDS ANALYSIS)?"

ORGANIZATION NEEDS ANALYSIS: A NEW METHODOLOGY

BY JOHN J.
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A recent, highly recommended article¹ reviews and critiques the state of the art regarding training needs analysis. Paraphrasing now, these authors conclude, among other things, that needs analysis is frequently conducted on a reactive, crisis basis; that the obtained data are rarely integrated with business/operating planning data; and, that most approaches to assess needs do not take into consideration the realities of organizational life, namely, "organizational politics and coalitions."

Assuming that the above criticisms are valid, as I think they are, there seems to be a paradox operating here. One mark of professionalism among trainers relates to their unique insights into human and organization development. Yet, it does appear that many trainers fail to capitalize upon these insights and, consequently, fail to seize upon the opportunity to increase their credibility and business worth within the firm.

What is the best utilization of

time of the training professional? Is it possible that trainers spend entirely too much time "doing," (classroom training) and entirely too little time conceptualizing (needs analysis)? This paradox, if true, is exacerbated by one or more of the traps of logic noted next.

Traps Trainers Fall Into

Trainers, like any other group of professionals, have their blind spots regarding the logic of their practice. Several examples related to needs analysis include:

- Failing to distinguish between what the firm says it wants, versus what it really needs. That is, the training function uncritically assumes the chief executive and senior staff must know the needs of the firm, otherwise why would they be in these high positions.

- Failing to distinguish between training needs and organization needs, that is, failing to relate training to the goals and objectives of the firm's business plan. A variation of this trap is to assume that all problems of the firm must be training problems.

- Disregarding needs analysis completely in the design of programs. That is, training content is generated solely on the basis of what trainers have lesson plans for, hoping that at least a basic need or two of the firm will be addressed.

- Depending totally upon staff intuitions or current training literature to define needs, without ever consulting the line organization for their perceptions.

This article will introduce a rationale, instrument and methodology that seemingly attends to the criticisms, paradox and traps noted above. The approach is calculated to improve the practice of needs analysis. Very likely, using this approach will produce fewer training programs. But the programs that do survive will be of higher quality, relevance and vitality *vis-a-vis* the real development needs of individuals and the firm.

Underlying Rationale

In the study of careers of individuals, I have found it useful to analyze a given career in terms of

an unfolding life theme.² Several constants or specific focal points for examination have been identified and, for example, all careers seem to have phase, direction, distance, velocity and transition components. Organizations have similar characteristics. That is, one way to analyze an organization and its needs is to postulate that organizations have careers, too.³ Firms change over time every bit as much as individuals. Training

THE CAREER OF THE ORGANIZATION EXERCISE

Reflect upon the career line of your organization (as you have observed it over the years, heard about it from "old timers" and/or as you simply have sensed it to be). Then follow the directions and answer the questions below.

1. Sort the organization's history into stages. Assign descriptive labels or category headings to each stage. The categories selected can include any terms you consider appropriate: A life cycle, evolving product/market trends, changing managerial philosophies, shifting functional dominance, such as a shift from engineering to marketing, etc.

You are encouraged to use imagination when you sort the organization's career history into these categories. For example, one organization was likened to four movements of a symphony. Select only those labels that very best describe the unique history of your organization.

2. Next, write a paragraph or two that summarizes to your satisfaction, each organizational career stage.

3. Now, note how these changes in the organization's career line have affected you and others in the firm, for example, with respect to recruitment/selection, promotions, morale, job design, the careers of incumbent employees, training/development practices, climate, business policy, day-to-day practices, managerial controls, delegation, employee attitudes/relations, communications, power issues between departments, etc.

4. Anticipate or predict what you think will be the next step in the career line of your organization. Supply a label or category heading for this new phase of the firm. What impact will this new career stage have upon you and others within the firm?

5. Retrospectively, what human resource and business planning mistakes has the organization made? Why did the organization fall into the traps that it did?

6. What new (or old) human resource and business planning strategies will best accommodate the next step in your organization's career line? Discuss the pros and cons of each option.

7. What implications does this historical analysis and predicted career next step of the firm have regarding your training needs and the training needs of others within the firm?

and organization needs begin to emerge when the firm's new directions and next career steps depart from the career capacities, values and aspirations of the incumbent employees making up the firm. Employees fitting this description are traumatized and either are plateaued or become obsolete. Simultaneously, the organization begins to sense morale/attitude problems and suboptimum productivity.

What is occurring, of course, is the emergence of a totally new set of needs analysis conditions. In these situations, conventional training needs analysis techniques frequently miss the mark unless there is some insight (and data) into the firm's evolution and its new requirements. A major problem for the training function — because it is frequently divorced from the business planning groups — is that trainers are not privy to these organizational shifts in direction and purpose. To further complicate matters, frequently the key executives of the firm are not fully aware of these shifts either. That is, the leadership can no longer articulate precisely what business the firm intends to be in and the new human resource requirements that will be involved. This "incubation period" can last for several years. The net result, unless alert, the training function finds itself in the unenviable position of training for yesterday's needs.

The Instrument

The writer developed the "Career of the Organization" exercise displayed here for use in identifying Career Management Systems problems of organizations (Leach, 1977).⁴

After reviewing some of these case histories, it quickly became evident that the exercise also was tapping into needs analysis areas related to both individual and organization development. Moreover, the data had a qualitatively different focus compared to other needs analysis techniques. Respondents report their feelings and thus can give full play to both their intuitions and emotional states as the various stages of the firm's career were personally experienc-

ed. Either in the displayed form or with modifications, the exercise can be viewed as a diagnostic, problem - seeking instrument, which can address virtually any problem of the firm where the history of the problem area is crucial to the present and future functioning of the firm.

Methodology and Analysis

A somewhat more detailed description of the approach is presented elsewhere.⁵ For purposes of this discussion, only the highlights need to be reviewed, which follow.

1. The instrument is completed by a representative, diagonal slice of the firm, sampling functions, departments, levels, headquarters/field units and staff. Including the business planners in the sample is particularly useful.

2. Each person in the sample completes the exercise independently of others in the sample. The completed exercise is sent to the analyst, for example, a training specialist.

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3. Where possible, participants are encouraged to provide quantitative data in order to provide the analyst with baseline, trend information.

4. No restriction is placed on length, although it is the rare completed history that exceeds 20 pages (typed and double-spaced).

5. Demographics related to age, tenure, sex, position location, etc. are requested on a covering sheet in order that the analyst may conduct one or more subgrouping analyses.

6. Where possible, after the analysis has been completed, one or more clarification meetings are scheduled. This allows for a feedback of findings to the sample and acts as an opportunity to generate additional impressions that enrich the sample data for deeper meaning.

The approach used to analyze findings is similar to content analysis or thematic analysis.⁶ Each completed exercise is reviewed for its essentials, as follows:

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• Stages of the firm's career and the labels assigned to designate these stages.

• The summary statements describing each stage, to the present.

• The impact of each stage upon the respondent and others within the firm.

• The prediction of career line, next step of the firm; the label supplied to designate the new stage; and expected impact upon the respondent and others within the firm.

• Traps the firm has fallen into, in the past.

• Strategies best suited to accommodate the predicted changes in the firm's career line.

• Specific training needs noted as necessary and relevant for the respondent and others within the firm.

As one might expect, this is a very projective like exercise. In fact, this is the major premise underlying the instrument and the methodology. Different people and different organizational units "see" the firm's immediate and future requirements differently. Moreover, the analyst gains insight where in the firm certain key developmental need assumptions are shared and where they are not shared. A value-added characteristic of the study is that the exercise has considerable potential to identify communication problems as these exist throughout the various pockets and units of the firm.

Early Findings

The data generated — subjective as they are — seem to stimulate a totally different "mind-set" on the part of the participants. Respondents frequently state that after completing the exercise they were startled to find what they had written. The historical perspective utilized in the exercise prompts new insights into why the firm has traveled the paths that it has and provides a glimpse of emerging needs of the organization in the future. The respondent's program of self-development becomes virtually self-evident. Completing the exercise allows participants to identify the continuities

associated with the firm's career, to be sure, but the discontinuities emerge as well. It is the latter that bespeak most eloquently of the new directions the training function must take in order to equip individuals and the firm to deal effectively with accelerated change and adaptation.

Regarding the usefulness of exercise findings to the training function, the following appear suggestive:

1. The obtained data have the capacity to link organization needs to individual training needs. Once the firm's compass setting for the future is clarified, training treatments are much easier to specify.

2. Exercise findings tap into the impacts of environments external to the firm. Completed exercise findings invariably take into account shifting values in the labor market, governmental intrusions, changing nature of competition, data which are extremely important in devising human resource strategy, to include planning new training programs. In a somewhat similar vein, exercise findings can generate new insights into just how well a reorganization is working and/or the consequences of a recent merger/acquisition.

3. Subtle shifts, over time, in climate, leadership style and communications come to the attention of the analyst. These context factors are important when planning the content of training programs. The exercise data, therefore, get very close to organization development issues and concerns.

4. Admittedly, the obtained data have a "soft-data" quality to them, say, when compared to turnover statistics, grievance rates or attitude survey percentage responses. Nonetheless, the data from the career of the organization exercise frequently explain why there is turnover, high rates of grievances and/or poor attitude profiles. This relates to the context features of the exercise mentioned in 3, above.

5. The obtained data frequently supply insights into the location and relative strength of the various power bases within the firm and the shifts that have occurred over time. Similarly, the methodo-

logy helps identify shifts in values, beliefs and attitudes populating the firm. The demographics which yield subgrouping analyses are particularly sensitive in identifying the different perceptions employees have as a function of age, tenure, sex, work group location, operating level, etc.

6. Because multiple and representative perceptions emerge during the study, the analyst begins to derive insights related to employee feelings. That is, exercise findings can be looked to as a rough barometer of existing morale tone within the firm.

7. This methodology is quite amenable for use in combination with other needs-analysis techniques, for example, assessment center findings and/or MBO outputs. In fact, scheduling this exercise as the first step in the needs-analysis phase, often provides valuable insights where next the training function should look for additional data.

An "organizational memory" ex-

ists but it is difficult to access. This state or condition of "collective unconscious," if penetrated, can have high yield in describing root causes of individual and organization need - improvement problems. These data are locked up in peoples' minds. One way to get at these data is to have people within the firm view the firm as having a career path which can change over time. The instrument and methodology described in this article have the potential, at least, to collect both historical and future perspectives for use in needs analysis projects.

The approach recommended should assist a training function become more adept in problem seeking and conceptualizing the nature of needs-analysis problems as these relate to both individual and organizational needs. The proposed approach definitely helps the trainer guard against premature diagnoses and the trap of confusing problem symptoms for root causes.

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