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OCT 24–25, 2022

SESSION: IDENTIFYING AND MEETING NEEDS & MEASURING THEIR IMPACT

SPEAKER: Kristopher Newbauer

Interactive Polling

This session includes interactive audience poll questions using Slido.

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Session Description

With a focus on getting needs assessments right, this session will examine how you can identify and translate business needs into talent development initiatives that add value.

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Session Objectives

Upon successful completion of this session, will be able to:

- Identify and translate business needs into talent development initiatives that add value
- Create talent development initiatives evaluation plans to demonstrate value
- Propose talent development initiatives to address business needs

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Identifying Talent Development Needs in Your Organization

- **Reactive**

Wait until we are approached by leadership, managers, employees, etc. about needs for talent development initiatives—offering "presenting" problems

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Identifying Talent Development Needs in Your Organization

- **Proactive**

  Conduct a needs assessment on a regularly-scheduled (generally annual) basis in an effort to illicit what talent development needs exist

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Identifying Talent Development Needs in Your Organization

- **Combination**

Both reactive and proactive

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Identifying Talent Development Needs in Your Organization

- Reactive
- Proactive
- Combination

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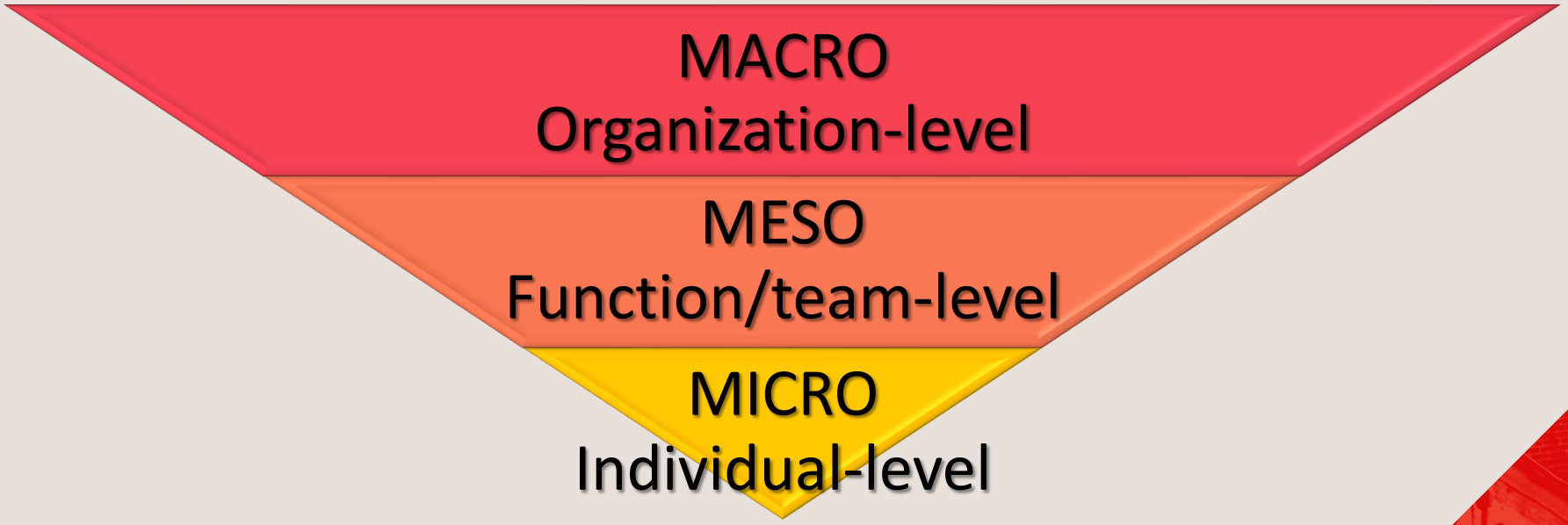
Levels of Talent Development Needs Assessments



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AUDIENCE POLL

Active poll

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Which level(s) of talent development needs assessment are conducted at your organization

Macro
0%

Meso
0%

Micro
0%

None
0%

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Edit

8 STEPS FOR CONDUCTING NEEDS ASSESSMENTS

Steps for Conducting Talent Development Needs Assessments

1. Differentiate your talent development business model – identify the functional categories for your business
2. Identify stakeholders for each category
3. Identify who on the talent development team will conduct the needs assessment for each category
4. Identify the methods to use for each category
5. Collect data/info (quantitative and qualitative)
6. Analyze and interpret data
7. Propose talent development solutions
8. Negotiate evaluation criteria

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1. Differentiate Talent Development Business Model

CATEGORY
COMPLIANCE
ONBOARDING
PERSONAL ENRICHMENT
ON-THE-JOB (OJT)
DEVELOPMENT

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1. Differentiate Talent Development Business Model

CATEGORY	SAMPLE CONTENT
COMPLIANCE	• Legal requirements • Regulatory agencies • Accreditations/certifications
ONBOARDING	• Company history • Mission/vision/values • Strategic plan • Culture • Employment policies
PERSONAL ENRICHMENT	• Physical and emotional well-being • Financial wellness • Hobbies
ON-THE-JOB (OJT)	• Technical skills • Functional skills
DEVELOPMENT	• Interpersonal skills • Technical skills

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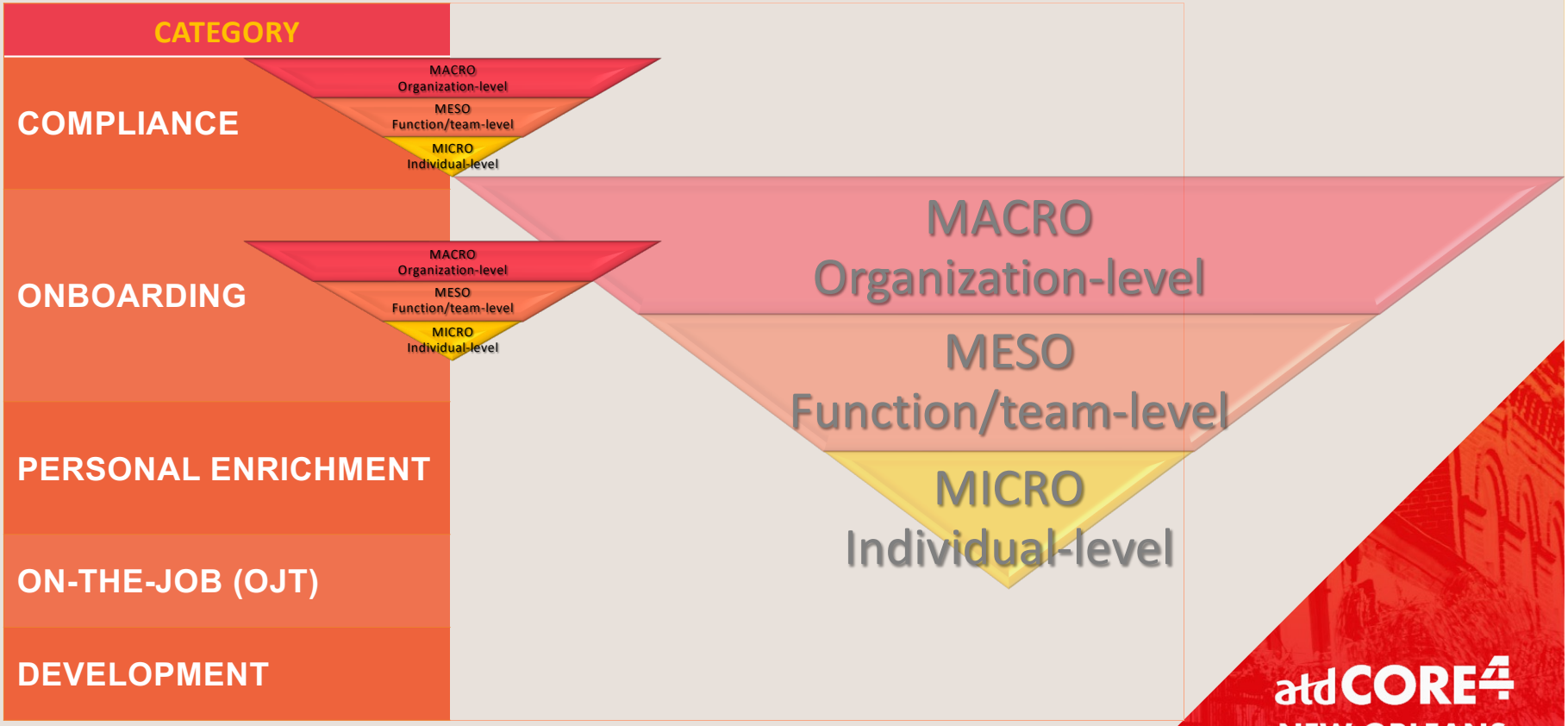
1. Differentiate Talent Development Business Model



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2. Identify Stakeholders

CATEGORY	SAMPLE STAKEHOLDERS
COMPLIANCE	• Office of the general counsel • Quality assurance/quality control • Audit
ONBOARDING	• Executive management/leadership team • Hiring managers • New hires • Employees • Prospective employees
PERSONAL ENRICHMENT	• Managers • Employees
ON-THE-JOB (OJT)	• Managers • Employees
DEVELOPMENT	• Managers • Employees

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3. Identify Talent Development Staff Who Will Conduct Needs Assessment

CATEGORY	ASSIGNED TO
COMPLIANCE	• Name
ONBOARDING	• Name
PERSONAL ENRICHMENT	• Name
ON-THE-JOB (OJT)	• Name
DEVELOPMENT	• Name

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4. Identify Methods for Each Category

CATEGORY	SAMPLE METHODS
COMPLIANCE	• Review applicable laws • Interview General Counsel
ONBOARDING	• Review company documents • Interview/survey company leaders • Interview/survey new hires • Interview/survey hiring managers
PERSONAL ENRICHMENT	• Survey employees
ON-THE-JOB (OJT)	• Review job descriptions • Focus groups with employees w/the same job • Conduct observations • Review performance appraisals • Administer self-assessments
DEVELOPMENT	• Survey employees • Review professional development plans

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Steps for Conducting Talent Development Needs Assessments

1. Differentiate your talent development business model – identify the functional categories for your business
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AN ALTERNATIVE APPROACH

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5. Collect Data & 6. Analyze and Interpret Data

How does your Executive Management/Leadership Team measure the success of your business? [Interview/survey/focus group]

- Profitability
- Customer acquisition
- Customer retention
- Employee experience
- Revenue diversification

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Differentiate Talent Development Business Model

CATEGORY
COMPLIANCE
ONBOARDING
PERSONAL ENRICHMENT
ON-THE-JOB (OJT)
DEVELOPMENT

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Differentiate Talent Development Business Model

CATEGORY	
COMPLIANCE	Value vs. Significance of Value
ONBOARDING	
PERSONAL ENRICHMENT	
ON-THE-JOB (OJT)	
DEVELOPMENT	

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Not “Instead Of” but Rather “In Addition To”

CATEGORY
PROFITABILITY
CUSTOMER ACQUISITION
CUSTOMER RETENTION
EMPLOYEE EXPERIENCE
REVENUE DIVERSIFICATION

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5. Collect Data & 6. Analyze and Interpret Data

Our business would be more **profitable** if WE:

- Increased **customer retention** by:
  - Improving customer satisfaction by:
    - ✓ Reducing employee turnover
    - ✓ Empowering employees to resolve customer service issues with fewer escalations

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7. Propose Talent Development Solutions

In order to empower employees to resolve customer service issues with fewer escalations, we need our employees to:

- Know: _____ (knowledge/cognitive domain) _____
- Be better at (quality): _____ (skill/psychomotor domain) _____
- Be faster at (efficiency): _____ (skill/psychomotor domain) _____
- Do more of (quantity): _____ (skill/psychomotor domain) _____

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Preview

8. Negotiate Evaluation Criteria

Business Goal: Increase net profits by USD$5,000,000 by 31 December 2023

- Increase **customer retention** by 5% by 31 December 2023:
  - Improving customer satisfaction scores by 10% by 30 September 2023
    - ✓ Reducing employee turnover by 5% by 1 July 2023
    - ✓ **Empowering employees to resolve customer service issues with an average rating of 3.5/5 and 75% fewer escalations by 30 March 2023**

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8. Negotiate Evaluation Criteria

Business Goal: Increase net profits by USD$5,000,000 by 31 December 2023

- **Training as % of solution:**
  - New products: 30%
  - Pricing adjustments: 5%
  - Marketing initiatives: 15%
  - Increase sales force: 25%
  - Incentive pay program: 10%
  - Customer service training: 15%

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$750,000

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QUESTIONS?

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The evaluation form for this session is available via QR code and at the following link: **https://core4.td.org/.**

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THANK YOU!

Kristopher.Newbauer@rotary.org