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Phase 2: Design

Needs Assessment Information Matrix

Overview

When you are collecting needs assessment information for a training project, you may require information about the people who will use the program (the audience), the work they do or will perform (their tasks), and/or the information or products they deal with or produce (the content). There are three primary ways of finding out more about the audience, tasks, and content involved in a project:

1. Observations are sometimes considered the most direct method of collecting needs assessment data, although in many cases, a great deal of inference is involved in interpreting observations.

2. Interviews are considered the easiest way of collecting needs assessment data. Questionnaires and focus groups may also be relatively effective and efficient methods. However, what people tell you and what they really do may differ. It is sometimes important to verify the results of interviews with observations and document analysis.

3. Documentation review, e.g., looking at employee personnel records, can provide useful needs assessment data. Of course, in some situations, it may be difficult or impossible to obtain desired documents.

Using the Information Matrix

Use the matrix on the next page to guide you in your selection of methods for gathering different types of information. Sometimes you will find it beneficial to use a strategy that relies on a combination of methods to collect needs assessment data for your training project.

Needs Assessment Information Matrix

Information Matrix

	SOURCE OF INFORMATION		
Type of Information	**Observation**	**Interview**	**Documentation**
Audience	• Observe in work environment	• Interview audience or supervisors • Conduct survey or questionnaire	• Review employee files or personnel records
Tasks	• Observe audience or expert performing	• Interview SME's or other performers • Conduct survey or questionnaire • Focus groups	• Review job descriptions, policies, logs or error reports • Work samples
Content	• Observe SME or creators of product/process	• Interview SME's, policy makers, marketers, managers or other stakeholders • Conduct survey or questionnaire • Focus groups	• Review product/process documentation