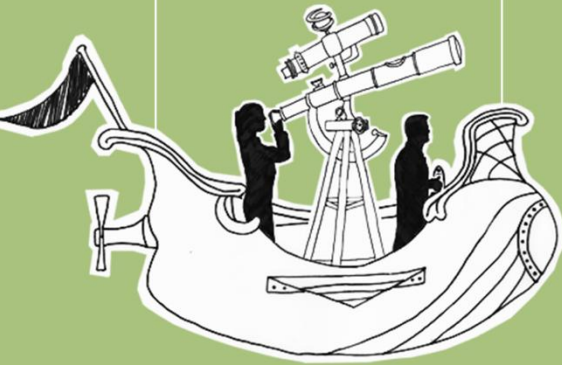




Training Needs Assessment



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This Training Needs Assessment guides teams through a short diagnostic process: clarify the business need, assess the current and future state, understand the root cause and identify the right mix of interventions.

Use it as a working document during scoping, stakeholder conversations or early learning planning. It can be completed by an L&D lead, change manager, project team or business owner.

How to use this template

- Complete the sections in order, starting with the business outcome
- Use evidence wherever possible, including performance data, adoption metrics, stakeholder feedback and employee insight
- Treat training as one possible intervention, alongside coaching, communications, process changes, leadership reinforcement and tool improvements
- Review the completed assessment with the relevant sponsor or decision-maker before agreeing actions

A note before you begin

This template is intended as a starting point rather than a comprehensive assessment. Whilst it can help identify potential capability gaps and intervention options, every organisation's context is different.

For complex challenges or business-critical initiatives, a more detailed diagnostic may be needed to fully understand the factors affecting performance and determine the most effective solution. If you'd like support with a full Training Needs Assessment, Change Readiness Assessment or learning strategy, [please get in touch with our experts](#).

Assessment Overview

Project	
Function	
Assessment Owner	
Key Stakeholders	
Assessment Date	

Define the Business Need

Start by defining the outcome the organisation needs to achieve. This helps keep the assessment focused on performance rather than activity.

What business outcome are you trying to achieve?	
What problem or opportunity has prompted this assessment?	
What evidence suggests there is a performance or capability gap?	
What would success look like?	
What are the risks if nothing changes?	
Which strategy, programme or business priority does this support?	

Evidence Checklist

Tick the evidence sources that support the need for intervention.

- | | |
|---|---|
| ☐ Performance metrics | ☐ Audit findings |
| ☐ Adoption data | ☐ Operational KPIs |
| ☐ Employee feedback | ☐ Incident data |
| ☐ Customer feedback | ☐ Process data |
| ☐ Survey results | ☐ Existing training feedback |
| ☐ Direct observations | ☐ Other |
| ☐ Stakeholder interviews | |

Consider the Assessment Level

Before assessing current and future state, consider where the capability gap exists. A performance issue may originate at one or more levels.

Consider whether the issue is primarily driven by organisational factors (strategy, structure, culture, workforce capability), team or operational factors (processes, ways of working, KPIs), or individual factors (knowledge, skills, confidence and behaviours). Often the root cause spans more than one level.

Assessment Level	Key Observation
Organisational	
Team / Operational	
Individual	

Assess the Current & Future State

Use this section to compare what is happening now with what needs to happen in the future. Be specific and evidence-based. Focus on observable differences in performance, behaviours, ways of working and business outcomes rather than general statements.

Area	Current State	Future State
Performance level		
Ways of working		
Behaviours		
Capability level		
Tools or systems		
Business impact		

Identify Affected Audiences

Map the groups affected by the change, performance gap or capability requirement. For the impact of change section, consider how each group will be affected, including changes to responsibilities, processes, systems, behaviours or performance expectations.

Audience / Role	No. of People	Impact of Change	Current Capability	Required Capability

Capability Gap Assessment

Rate current and required capability using a 1–5 scale, where 1 = low and 5 = high. Calculate the gap by comparing the current and required scores.

Complete this assessment for each identified audience group where capability requirements differ. If multiple groups share similar capability needs, they may be assessed together.

Capability Area	Current (1-5)	Required (1-5)	Gap (Current - Required)
Role or process knowledge			
Technical skills			
System or tool use			
Digital literacy			
AI capability			
Confidence			
Leadership capability			
Change readiness			
Stakeholder engagement			

Larger gaps indicate areas where additional development, support or intervention may be needed. Focus first on capability areas with the largest gaps and the greatest impact on business performance.

Root Cause Assessment

A capability gap is not always a training issue. Use this section to identify what is actually limiting performance.

Potential Cause	Limiting Performance	Comments
Lack of knowledge	☐	
Lack of skills	☐	
Lack of confidence	☐	
Unclear expectations	☐	
Ineffective process	☐	
Lack of leadership support	☐	
Poor communication or awareness	☐	
System or tool issues	☐	
Resistance to change	☐	
Organisational environment	☐	
Performance measures & incentives	☐	

Primary Root Cause

Summarise the primary factor limiting performance, supported by the evidence gathered during the assessment.

Primary Root Cause	
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Stakeholder Interview Guide

Use these prompts with leaders and employees to build a fuller view of the gap.

Leadership Questions

- What business outcomes are most important to achieve?
- What evidence suggests there is a performance issue?
- What does good performance look like?
- What is stopping teams from working in the desired way?
- What support or reinforcement is currently in place?
- How should success be measured?
- What evidence suggests people are ready and willing to adopt the required changes?

Employee Questions

- Which parts of the role or process are most challenging?
- What knowledge or skills would help you perform more effectively?
- What gets in the way of achieving the desired outcome?
- What support would be most useful?
- Have previous training or support activities helped?
- How confident do you feel performing the required behaviours?

Determine the Right Intervention

Select the intervention or combination of interventions that best addresses the root cause. Training may be required, but it should not be assumed.

Gap Identified	Root Cause	Recommended Intervention	Owner	Priority

Intervention Options Examples

The following are examples of possible interventions. Select all that apply.

- | | | |
|------------------------------------|--|--|
| ☐ Training | ☐ Knowledge sharing | ☐ Community of practice |
| ☐ Coaching | ☐ Process redesign | ☐ Change management support |
| ☐ Mentoring | ☐ Communications | ☐ System improvement |
| ☐ Job aids | ☐ Leadership engagement | ☐ Other |

Success Measures & Review

Define how the impact of the agreed intervention will be measured. Focus on outcomes rather than attendance or completion alone.

Measure	Current Baseline	Target / Desired State	Review Date
Adoption			
Productivity			
Quality			
Confidence			
Behaviour change			

Assessment Summary

Key Capability Gaps	
Primary Root Cause	
Recommended Interventions	
Priority Actions	
Expected Business Outcome	
Success Measures	

Need additional support?

Completing a Training Needs Assessment is only the first step. The real value comes from translating findings into practical actions that improve performance and deliver business outcomes.

If you need support with a bespoke assessment, prioritising interventions, developing a learning strategy or delivering wider change and adoption support, [get in touch with our team.](#)