

Activity 7

Identifying development needs

▶▶▶ What happens

After some initial trainer's inputs on the identification of training needs, the participants brainstorm ways of determining levels of performance.

You then lead a discussion on the differences between symptoms and causes in needs analysis. The participants then work in pairs to carry out cause and effect analyses on their previously identified performance measurements.

Next, you explain knowledge/skill/attitude analysis and the participants carry out their own analysis on some simple tasks, after which they discuss and evaluate different assessment tools.

Finally, they apply some of these tools to themselves in peer assessment of each other using a mentor's knowledge/skill/attitude analysis.

🕒 Time

Overall time required: 1 hour 30 minutes

- Introduction: 10 minutes
- Identifying performance levels: 30 minutes
- Task/Job analysis: 20 minutes
- Performance assessment: 30 minutes

📁 Materials & resources

- 4 OHT masters:
 - 7.1 *Systematic training cycle*
 - 7.2 *Performance gaps*
 - 7.3 *Identifying categories of performance*
 - 7.4 *Knowledge, skills and attitudes*

- 7 Handout masters:
 - 7.5 *Cause and effect diagram – lost sale*
 - 7.6 *Cause and effect diagram – blank framework*
 - 7.7 *Identifying knowledge skills and attitudes – paper aeroplane*
 - 7.8 *Identifying knowledge, skills and attitudes – joke*
 - 7.9 *Mentor’s knowledge, skills and attitudes*
 - 7.10 *Performance assessment techniques*
 - 7.11 *Mentor training needs*

- Overhead projector, or PowerPoint®-compatible laptop computer and projector, and screen
- Flipchart and stand or whiteboard
- A good supply of flipchart paper
- Marker pens for trainer
- Paper and pens for participants

▶ How do I do it?

INTRODUCTION



Show OHT 7.1
Systematic training cycle

Tell the participants that, although this is a continuous cycle, the initial starting point is often the identification of needs. In essence, the identification of needs is relatively straightforward. To illustrate this:



Show OHT 7.2
Performance gaps

Explain that the real skill lies in:

- specifying the performance standard in the first place
- breaking the standard required into the constituent parts of knowledge, skills and attitudes, and
- converting symptoms of performance issues into performance problems so that the **problem** is addressed rather than the **symptom**.



The use of these simple questions allows us to group people into three categories:

- People whose performance is unsatisfactory and for whom development training is a **must**.
- People whose performance is more than satisfactory and whose need for development training is a **should**.
- People whose performance is OK but who may need training to keep them on the ball for whom training is a **could**.

The use of value statements such as 'must', 'should' and 'could' recognises the need for some form of prioritising and recognition of organisational constraints.

IDENTIFYING PERFORMANCE LEVELS

Refer to the first question on OHT 7.3 – 'Is performance satisfactory?' Divide the participants into small groups and ask them to spend 10 minutes listing the different ways in which they can and do answer this question, about others and themselves.

After 10 minutes, bring all the participants together and ask for their suggestions. They should include:

- feedback from customers/suppliers (internal and external), colleagues, partners
- efficiency records (quantity, quality, time, costs, and so on)
- self-identification
- 'new' systems, products, initiatives which automatically mean that people's performances are 'not satisfactory'
- appraisal system outcomes
- new staff, roles, promotions

- new technology, products, services, customers, materials.

Encourage them to look further at their lists to specify which of these indicators are **the symptoms** rather than the causes of performance problems. It is likely that many performance problems will fall into the symptoms category and then require further analysis to identify the causes.



Distribute Handout 7.5
Cause and effect diagram – lost sale

Explain the use of these diagrams:

A method to enable possible causes of a particular effect to be identified – a creative thinking technique. One of the most useful aspects of these diagrams is that they encourage us to look beyond the symptoms (effect) to identify the problem (cause).



Distribute Handout 7.6
Cause and effect diagram – blank framework

Ask the participants to work in pairs to select a symptom from their list to analyse its possible causes. Encourage them to think in terms of both **training** issues and **non-training** issues, since, if the latter is the cause, no amount of training and development work will rectify the situation. Tell them they have 10 minutes for this work.

You may find that many ideas will be suggested for the possible causes of the effects examined, but they should include some of the following:

- inappropriate selection for the job in the first place; too big a gap to have closed in the time available
- ineffective initial training
- ineffective work processes, system design, procedures
- motivational problems, as opposed to competence issues
- standards too high, unachievable except by a select élite

- has all the skills but not the appropriate attitudes.

The ideas suggested by the participants should enable you to summarise by saying that identification of the problem is not enough in itself; further analysis work is required.

TASK/JOB ANALYSIS

Explain that this analysis can be very detailed or quite superficial, but will probably need, as a minimum, to break the job into some of its constituent parts, tasks, and some of those tasks into their elements. From this, the requirements for a task or job can be identified.



Show OHT 7.4
Knowledge, skills and attitudes

Explain that the requirements that a person needs to carry out a job or task can be divided into:

- knowledge – facts, data, information
- skills – manual, mental, interpersonal abilities
- attitudes – motivation, willingness, desire.

Divide the participants into two groups and give each participant the appropriate handout – give the participants in Group 1 Handout 7.7 Identifying knowledge, skills and attitudes – paper aeroplane, and the participants in Group 2 Handout 7.8 Identifying knowledge, skills and attitudes – joke.



Distribute Handout 7.7
Identifying knowledge, skills and attitudes – paper aeroplane, and
Handout 7.8
Identifying knowledge, skills and attitudes – joke

Ask them to look at the tasks and to identify the knowledge, skills and attitudes that would be needed to perform them effectively. Tell them they have 10 minutes for this exercise.

After 10 minutes, bring all the participants together and lead a plenary review of their findings.

There should be some significant differences in the outcomes, and some humour since Handout 7.7 shows a simple reproductive task, while Handout 7.8 contains a fairly complex productive task although, at first sight, this also looks simple.



TRAINER'S NOTE

For more detail on reproductive and productive tasks and their implications for coaching, refer to *Activity 8 One-to-one coaching – reproductive tasks* and *Activity 9 One-to-one coaching – productive tasks*.

Some of the possible responses may be:

How to make a paper aeroplane

Knowledge:

- different sorts of folds
- aerodynamic qualities of different designs
- variety of sizes and types of paper and their effects

Skills:

- paper folding techniques
- ability to fold paper with or without a flat surface
- ability to judge distances/sizes

Attitudes:

- careful, methodical, step-by-step approach
- desire to make something that works
- quality attitude

How to tell a joke

Knowledge:

- the lines or script
- what people find to be funny
- any cultural differences in humour
- the impact of non-verbal behaviour

Skills:

- getting the timing right
- how to alter the tone of voice to suit

- how to keep a straight face or laugh regardless of the circumstances
- maintaining eye-contact with the audience

Attitudes:

- the desire to entertain
- willingness to be the centre of attention
- desire to get it right first time – there's no second chance.



Distribute Handout 7.9

Mentors' knowledge, skills and attitudes

This shows an example of such an analysis. Allow several minutes for the participants to read it and then invite them to add any others which they have identified from their own experiences. You might add that this analysis does not require mentors to be more senior than the mentee or from the same professional or technical background; this has allowed the development in many organisations of peer mentoring processes. You can also add that many organisations see the attitudes as being far more important than the necessary knowledge or skills, since these can be relatively easily developed whereas attitudes cannot. This, in turn, will have an effect on the selection and pairing of mentors with mentees.

PERFORMANCE ASSESSMENT

You may find it useful to start this exercise by explaining some of the many performance assessment tools available.



Distribute Handout 7.10

Performance assessment techniques

Ask the participants to work in pairs to complete the grid and select the ones which would be most useful to them in assessing their own performances and those of their mentees. Tell them they have 10 minutes to complete their grids.

You should find that the advantages and disadvantages identified will include the following:

Job fulfilment

Advantages:

- can be tracked over time
- 'hard' and 'soft' data can be used
- it's what we're aiming towards

Disadvantages:

- concentrates on outputs not inputs
- focuses on today not tomorrow
- relies on accurate job descriptions

Video/audio recording

Advantages:

- no excuses
- the 'real' thing
- can be examined in detail at leisure

Disadvantages:

- time consuming and expensive
- not necessarily representative
- act of recording may influence performance

Observation

Advantages:

- can use self or third parties
- checklists can make it systematic
- can gather many different views
- can be done more than once

Disadvantages:

- relies on acceptable criteria
- expensive and time consuming
- are the assessors effective?

Tests

Advantages:

- good at assessing knowledge
- easy to administer and score
- easy to devise

Disadvantages:

- do they measure knowledge or ability to do tests?
- dubious acceptability to adults

Questionnaires

Advantages:

- can be 'scientific'
- can be externally validated
- allows comparisons with norms

Disadvantages:

- relies on reliable and valid tools
- needs people with access to assessee
- hidden agendas may influence results

Psychometric tests

Advantages:

- good at determining attitudes
- can be externally verified
- can look at particular aspects

Disadvantages:

- not always culturally acceptable
- expensive to do properly
- possible problems with interpretation

The final part of the previous exercise asked the participants to consider which methods would be most suitable for assessing their own performances as mentors. One method which is commonly identified is the use of checklists for assessment by self and/or a third party. Refer back to Handout 7.9 and suggest that they now try these techniques for themselves.



Distribute Handout 7.11
Mentor training needs

Ask the participants to work in pairs with the same partner as before to carry out some initial assessment and identification of each other's development needs. Tell them they have 10 minutes each for this exercise.

Occasionally, someone will protest that they do not know the other participants well enough to form any sort of judgement. If this happens, you can point out that they have already worked with each other for some XX hours and will have formed some impression which can be fed back, and that this is, in fact, a common issue which needs to be addressed in mentor/mentee relationships.



TRAINER'S TIP

If *Activity 2 What do I do?*, has been used, then you can refer participants to that in order to add any other attitudes to the list on Handout 7.9.

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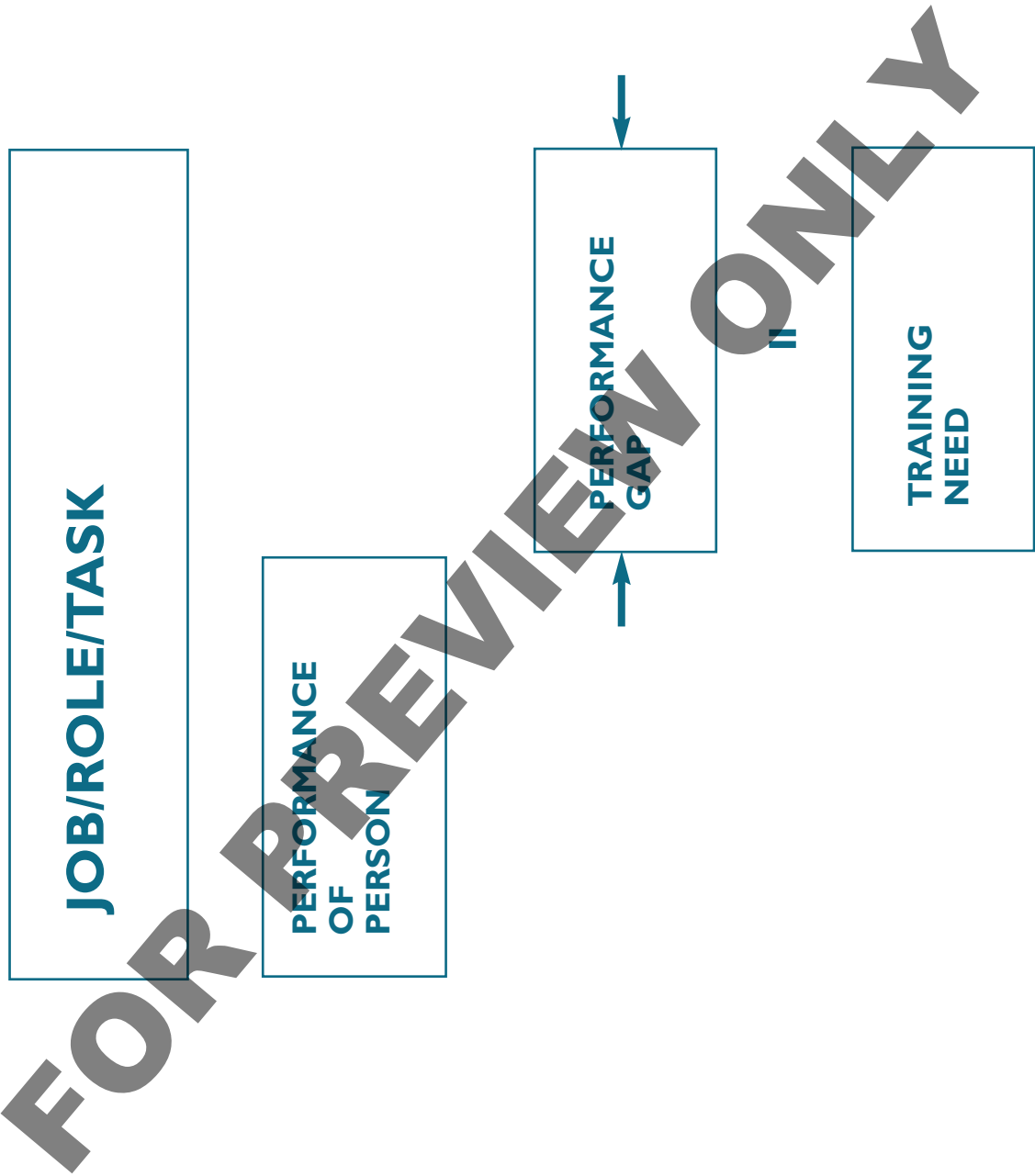
Systematic training cycle



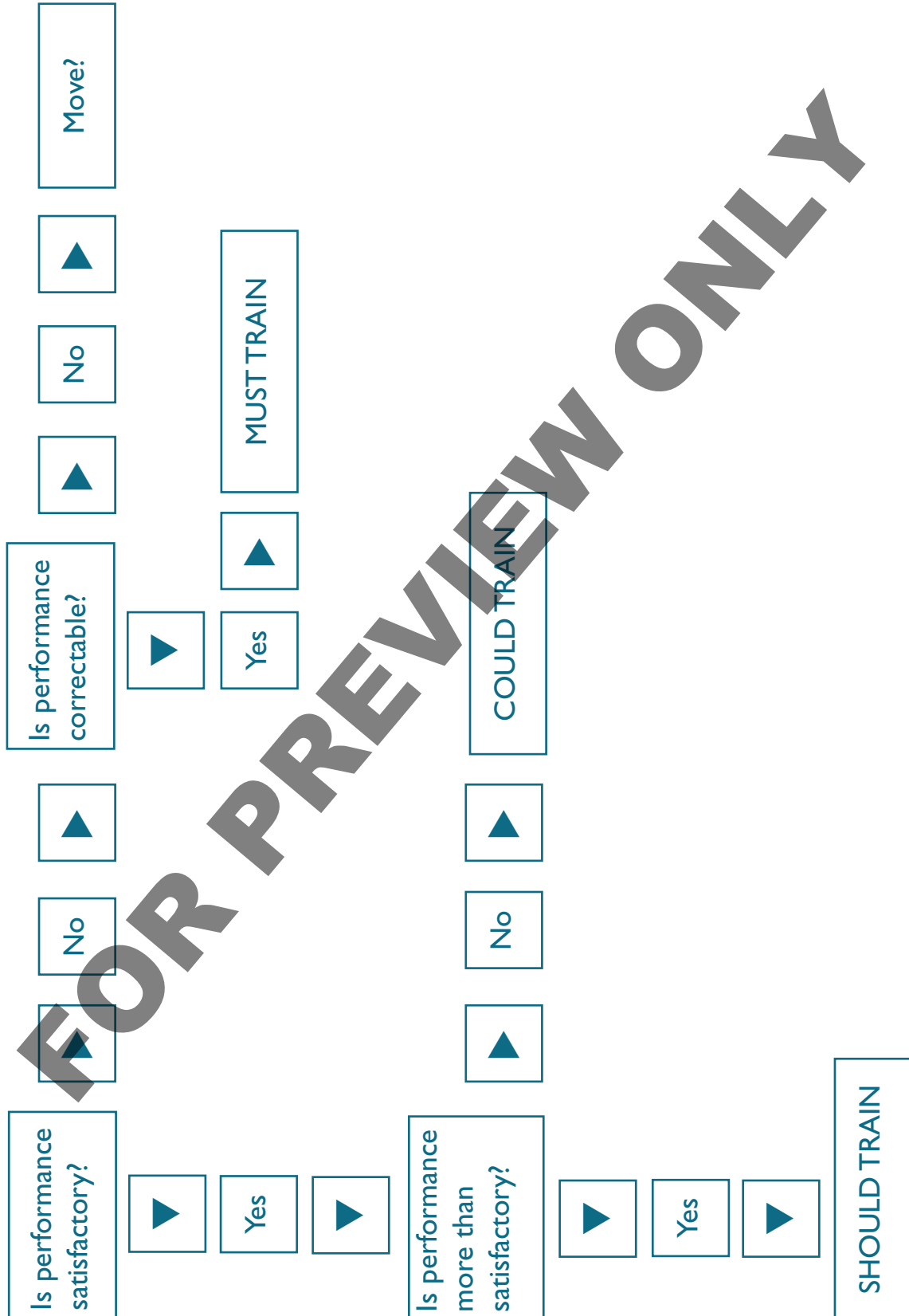
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Performance gaps



Identifying categories of performance

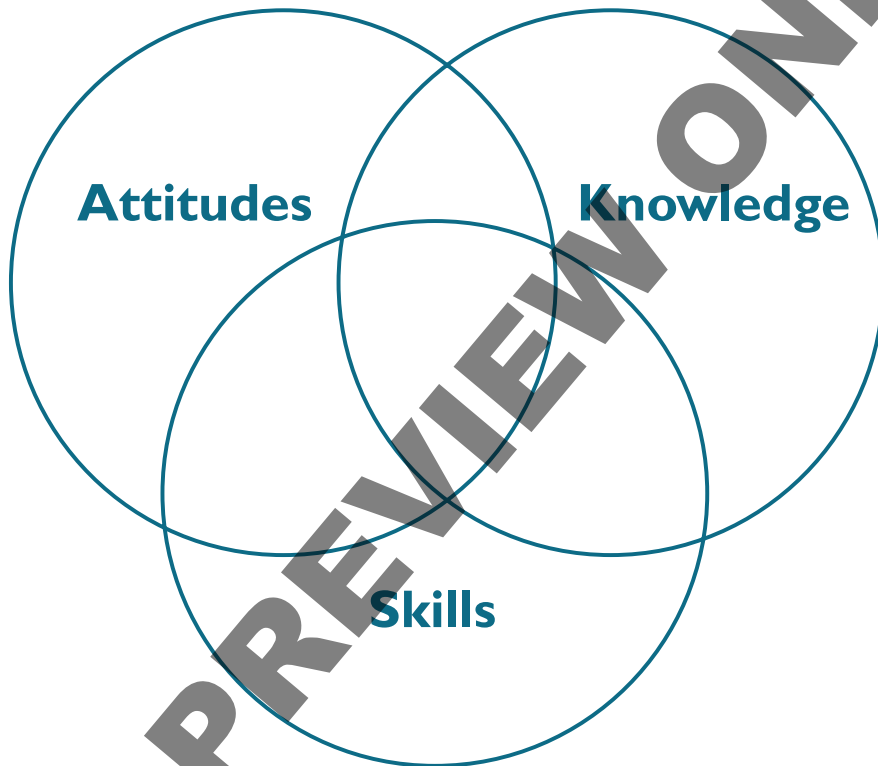


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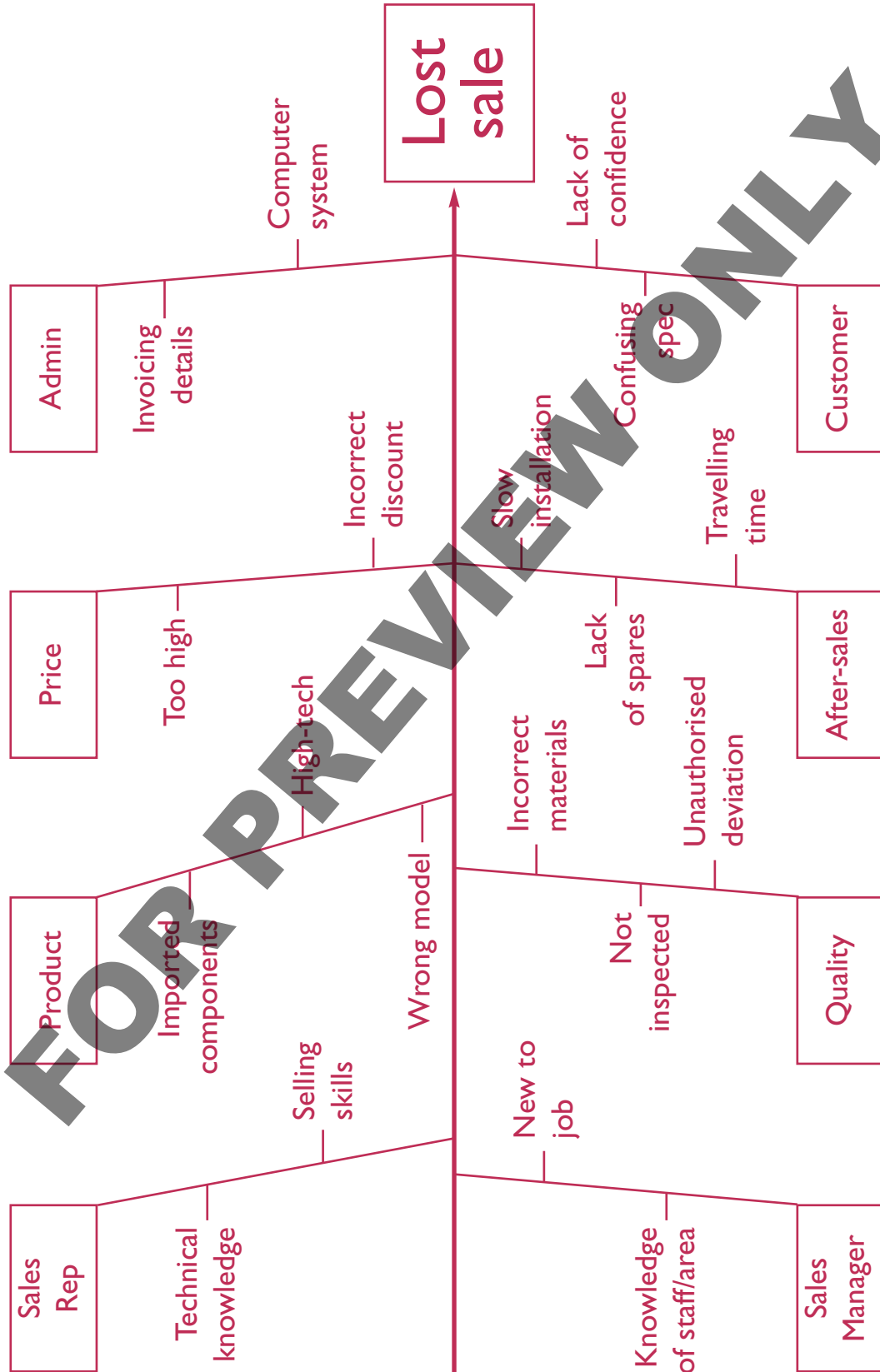
Knowledge, skills, attitudes



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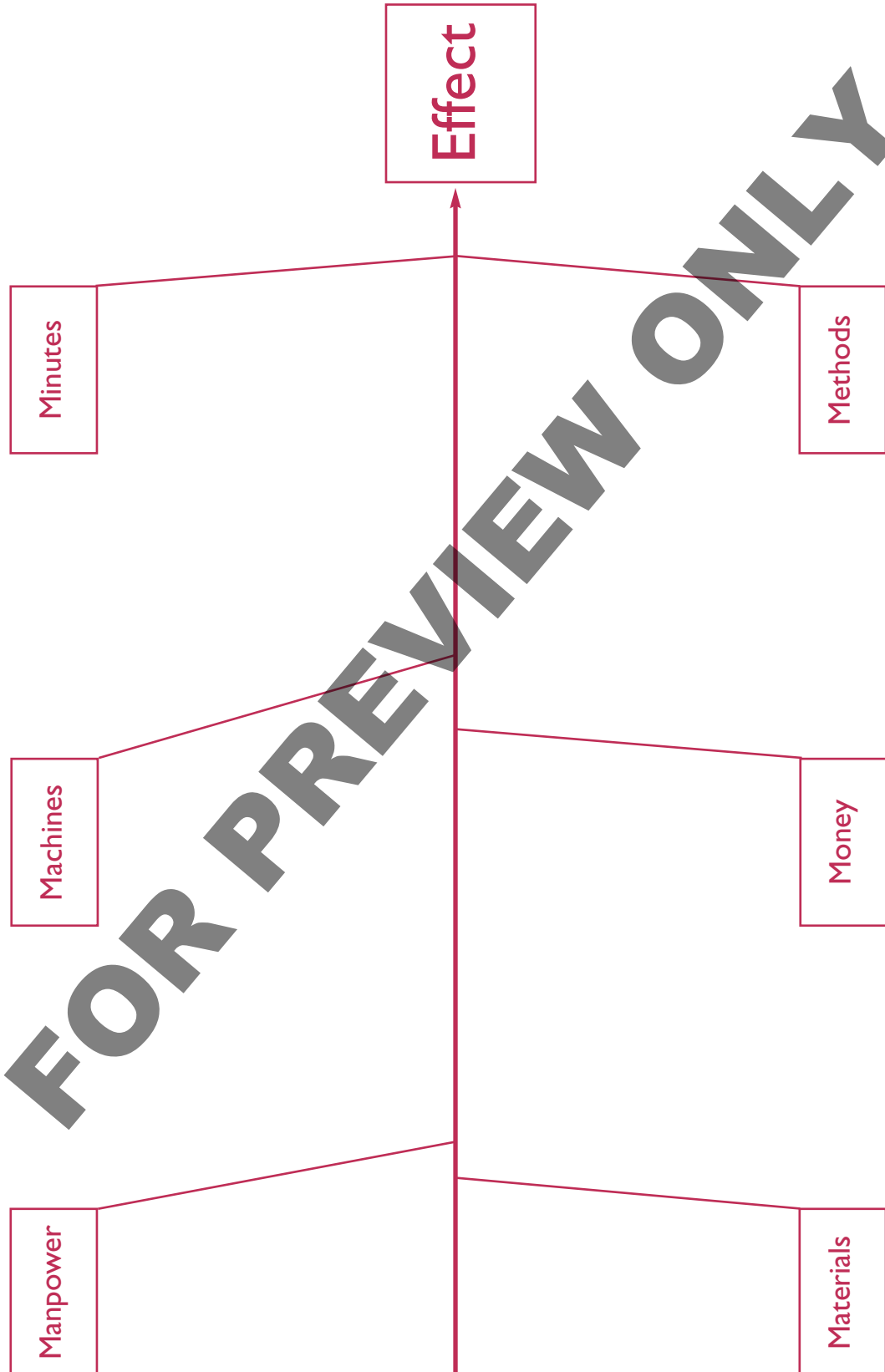


Cause and effect diagram - lost sale





Cause and effect diagram – blank framework



Identifying knowledge, skills and attitudes – paper aeroplane



The analysis of tasks into their required elements is necessary for any systematic assessment of performance. Within your group, analyse the following task and describe the knowledge, skills and attitudes that would be required. In addition, think about how you would assess a person's level of those attributes.

Your group's task is:

HOW TO MAKE A PAPER AEROPLANE.

You have 10 minutes for this task.

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7





Identifying knowledge, skills and attitudes – joke

The analysis of tasks into their required elements is necessary for any systematic assessment of performance. Within your group, analyse the following task and describe the knowledge, skills and attitudes that would be required. In addition, think about how you would assess a person's level of those attributes.

Your group's task is:

HOW TO TELL A JOKE SO THAT THE AUDIENCE LAUGHS.

You have 10 minutes for this task.

FOR PREVIEW ONLY



Mentor's knowledge, skills and attitudes



Knowledge:

- organisational goals, aims, context
- performance measurements
- his/her mentee, their job, standards, line manager
- task/job analysis techniques
- feedback mechanisms
- motivation theories
- organisational political scene
- monitoring techniques
- others ...

Skills:

- giving feedback
- listening
- questioning
- coaching
- counselling
- monitoring
- prioritising
- others ...

Attitudes:

- desire to help others
- enthusiastic, positive, flexible
- accessible
- approachable
- volunteer
- open, self-critical
- others ...

7

FOR PREVIEW ONLY





Performance assessment techniques

Method	Advantages	Disadvantages
Job fulfilment		
Video/audio recording		
Observation		
Tests		
Questionnaires		
Psychometric tests		
Others ...		

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Mentor training needs



Use the grid below to carry out an initial assessment of your partner. Mark on the grid where you think their level of ability would lie. Use the following indicators:

	1: not yet OK (or do not know)	2: needs some work or development	3: OK
Knowledge:			
– organisational goals, aims, context			
– performance measurements			
– his/her mentee, their job, standards, line manager			
– task/job analysis techniques			
– feedback mechanisms			
– motivation theories			
– organisational political scene			
– monitoring techniques			
– others ...			
Skills:			
– giving feedback			
– listening			
– questioning			
– coaching			
– counselling			
– monitoring			
– prioritising			
– others ...			

Continued ...





Mentor training needs

... continued

	1: not yet OK (or do not know)	2: needs some work or development	3: OK
Attitudes:			
– desire to help others			
– enthusiastic, positive, flexible			
– accessible, approachable			
– volunteer			
– open, self-critical			
– others ...			

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