# Step One: Identify the Future State

## Recording the Data

There are a wide variety of templates and tools available to help you track the information gathered during the training analysis process. The tool that you choose will depend on the complexity of your analysis.

Here is a simple template that we will work through.

|  |  |  |  |
| --- | --- | --- | --- |
| **Future State** | **Current State** | **Gap** | **Action Plan** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

## The First Step

The first step in your analysis process is to identify your future state. What do you want the results to look like when the skills gap has been bridged and training is complete? An easy place to find the ideal future state is to look for competency statements in a job description or job analysis conducted by your HR department. A good future state summary is objective, realistic, and quantitative, just like a competency statement.

## Case Studies

Sample future state/competency statements for someone working in a contact center, for example, could include a general competency statement that is further broken into individual competencies. Let’s look at some examples.

Competency Group: Contribute to an environment that focuses on customer value.

*Competencies required:*

* Manage knowledge of the customer and the market
* Create value with every sales opportunity
* Communicate the value to customers
* Create and manage a customer retention plan
* Measure the value of the transaction

Competency Group: Maintain up-to-date product and technical knowledge.

*Competencies required:*

* Take learning and professional development opportunities to keep up to date
* Acquire up-to-date technical skills and demonstrate proficiency every four to six months
* Be a lifelong learner
* Conduct product and marketplace research to stay current

## Defining the Future State

You may also choose to use industry benchmarks, best practices, or standardized guidelines to help set your future state. For example, if you are performing a training needs analysis on your organization’s project management processes (a helpful tool when your workforce is being grouped into project teams but has never done any project management training), you might use a project management framework as your target.

In either case, here are some questions that can be used to narrow down the characteristics of the desired future state.

* What would the ideal outcome of this training be?
* What metrics and results will help us measure the success of this future state?
* How will activities, processes, and employee tasks look in this state?
* What will business results look like in this state?

Sample Project: Improve Response Times to Customer Inquiries

|  |  |  |  |
| --- | --- | --- | --- |
| **Future State** | **Current State** | **Gap** | **Action Plan** |
| Customer e-mail inquiries will be replied to within 24 hours on average |  |  |  |
| Customer telephone inquiries will be answered within 5 minutes on average |  |  |  |

# Step Two: Identify the Current State

## Gathering Data

Next, identify how things currently look. This involves gathering data from as many sources as possible, such as statistics, reports, interviews with stakeholders, surveys, etc. Focus on quantitative measures that are equivalent to the desired future state. For example, if your future state focuses on response time to customer inquiries via e-mail, the data that you gather for the current state should focus on that as well.

Here are some questions that you can use to identify the current state.

* What is happening that makes us want to improve this situation?
* What metrics can we gather about this situation?
* What steps take place in this process?

You will need to access several data sets, including performance data (who does what, when they do it, and how much they do). These numbers are often captured in annual or periodic performance reviews, and may be called key performance indicators (KPI’s). You may also be able to gather team statistics and electronic reporting (such as phone call volume and duration, clicks on a keyboard, number of steps taken to complete a task, etc.).

Sample Project: Improve Response Times to Customer Inquiries

|  |  |  |  |
| --- | --- | --- | --- |
| **Future State** | **Current State** | **Gap** | **Action Plan** |
| Customer e-mail inquiries will be replied to within 24 hours on average | Average response time is 32 hours |  |  |
| Customer telephone inquiries will be answered within 5 minutes on average | Average hold time is 8 minutes |  |  |

# Step Three: Measure the Gap

Now that you have two points of comparison, it should be easy to measure the gap. This will help you prioritize action items and focus on high-value items.

Sample Project: Improve Response Times to Customer Inquiries

|  |  |  |  |
| --- | --- | --- | --- |
| **Future State** | **Current State** | **Gap** | **Action Plan** |
| Customer e-mail inquiries will be replied to within 24 hours on average | Average response time is 32 hours | 8 hours |  |
| Customer telephone inquiries will be answered within 5 minutes on average | Average hold time is 8 minutes | 3 minutes |  |

Once you have identified the gap, you can perform additional interviews and analysis to identify causes of the gap. You can use the five whys technique, SWOT analysis, and other problem-solving tools to help you in your investigation. (See Session Four for more information.)

* Continuing with our customer service example, you might gather the following information.
* Review e-mail response statistics, which show that e-mail inquiries are responded to within 15 hours on the weekdays and within 40 hours on the weekend.
* Review e-mail response team staffing levels: 15 members on weekdays, 5 members on the weekend.
* Review telephone response statistics, which show that the average hold time skyrockets to about 12 minutes during the lunch and shift changeover periods. The average hold time outside of these periods is about 4 minutes.