THE NEEDS ANALYSIS PLAYBOOK

HOW TO MAKE L&D A TRUSTED PARTNER IN YOUR ORGANIZATION

With ♥ from your friends at

SWEETRUSH®

WHAT'S INSIDE

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Meet our expert
EMMA KLOSSON

Emma Klosson was destined to work in a role where she would help others thrive and grow. At school, she was the student that teachers would put the newcomers with—“Emma will show you where everything is.” In her after-school jobs, new hires would be sent to Emma to “see how it's done.” It wasn’t until she was a couple of years into her first proper job, however, that the role became official. Selected by the company’s training team for her subject matter expertise, she began her career in L&D as a trainer.

A year later, Emma completed her Certificate in Training Practice with CIPD, and everything changed. Instead of being limited to teaching people what she knew how to do, Emma now had the tools and skills she needed to help all kinds of people with all kinds of training needs.

The rest, as they say, is history. Emma spent the next 20 years applying those tools and practicing and honing her skills while working for industry-leading companies and award-winning vendors. Passionate about creating engaging learning experiences that impact business results, Emma is an advocate for spending time on needs analysis and evaluation.

At SweetRush, Emma is surrounded by a group of talented professionals who bring their own unique sets of skills and passions together, and she couldn’t be happier.

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INTRODUCTION

With increased pressure to be more agile and responsive than ever, it's understandable that L&D teams might be looking for ways to scale back or sidestep needs analysis altogether. **But this is a mistake**—especially if you are expected to create solutions that show an impact on performance or business results.

You can't afford to be complacent.

Failure to do a needs analysis will have a direct impact on your solution. What are the risks of skipping this important step?

- Your solution won't meet the business need.
- Your content and experiences won't engage the learners.
- Your learners can't or won't apply new behaviors and skills when they get back to work.
- Leadership won't buy into or support your solution.
- The solution will fail.

And I'm not alone in thinking this. Type "Why Training Fails" into your search engine of choice, and you'll see the items on my list—or iterations of them on countless similar lists.

And who takes the fall when learning solutions fail? L&D, of course.

It's a sad fact that, in challenging times, it is the L&D departments' budgets and resources that are often the first to be cut. L&D is still seen by many companies as a cost center and not a business partner. And when leaders and stakeholders can't make the correlation between their investment and the business results—if they can't see the value that training provides—they cut costs.

In a survey conducted by the CEB, only 33% of business leaders think the L&D function impacts business outcomes, and fewer consider the function to be relevant or timely.[1]

1. https://www.cebglobal.com/content/dam/cebglobal/us/EN/talent-management/metrics-that-matter/pdfs/what-ceos-want-from-ld-whitepaper.pdf

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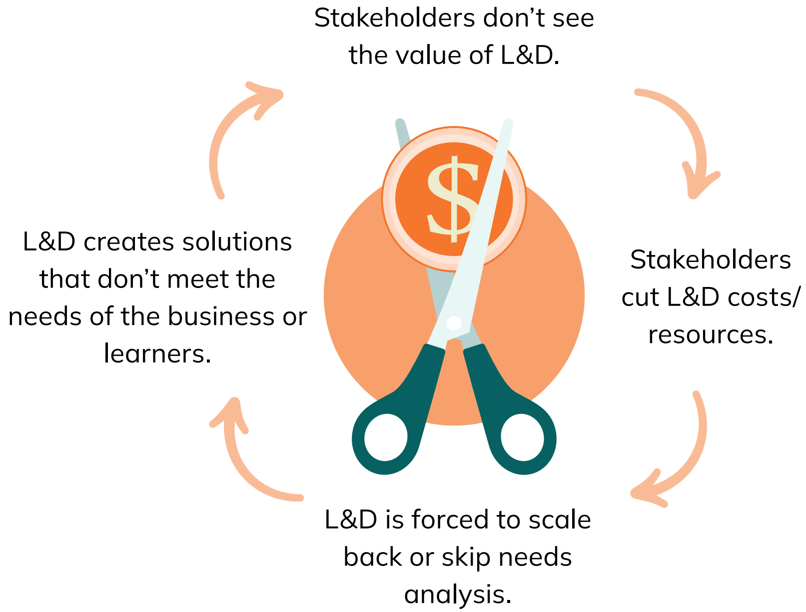
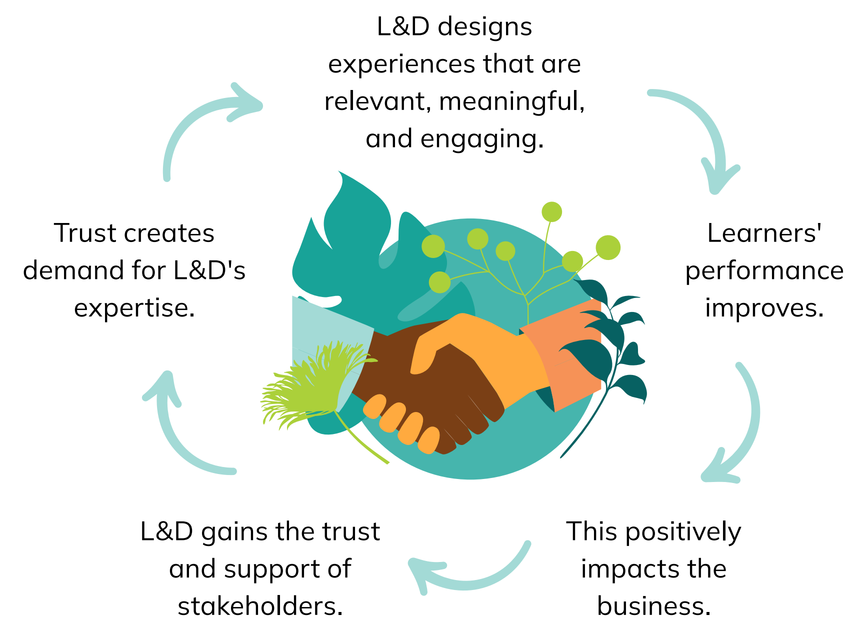
It’s a vicious cycle.



It’s time to break the cycle!

The good news is it doesn’t have to be like this. Each and every one of the reasons training fails—and not just those on my list—can be avoided by completing a thorough needs analysis.

When you take the time to get the needs analysis right, you will design experiences that are relevant, meaningful, and engaging to learners, and that change behaviors and performance.



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And when you can do this, you'll elevate L&D's position from cost center to trusted partner.

What are you waiting for? In this eBook, I'll show you how to take your first step toward that partnership. I'll help you:

- **Partner and consult with your stakeholders to set clear goals.** And uncover what is really driving the need and who it affects. Find out what success looks like, how to measure it, and how to determine whether training is the right (and only) solution.
- **Gain a deep understanding of your learners' wants and needs.** And build empathy with your learners. Discover what types of learning experiences will engage and motivate them.
- **Take control of the constraints.** And anticipate the constraints you might face. Identify how and where you can influence the time, budget, and resources needed to complete your training project.
- **Influence and gain buy-in from the stakeholders.** Synthesize your findings and present your recommendations in a clear and compelling way.

I'll also bust some myths about needs analysis, beginning with this one: "Needs analysis takes too long." Needs analysis can feel like an overwhelming task, but it doesn't have to be a big undertaking. I'll show you how to scale your efforts, and I'll share some of my shortcuts for must-do vs. nice-to-do activities.

Who is this book for?

While its target audience is made up of learning designers and practitioners who will be conducting the needs analysis, the book will also benefit other learning professionals.

I am a learning leader.

As you are reading this book, ask yourself: "Am I giving my teams enough time and resources to do this work? Where can I use my influence to gain stakeholder support and collaboration? How will needs analysis help me get a seat at the leadership table for L&D?"

I am considering entering a vendor partnership.

As you are reading this book, think about how much of the work you can do before finding a vendor partner. Not only will this speed up the solution design process, but it should also save you money.

Don't have the time or resources to do the work? Use this book and the resources provided as a checklist to make sure that the vendor is asking you all the right questions.

I need to prepare instructional content, such as presentations and webinars.

The principles in this book apply whether you are designing a complex learning curriculum or a one-hour webinar. You won't need to go as deep into the analysis for the latter—you certainly won't need to write a report. You will, however, benefit from uncovering the underlying needs of your stakeholders and audience, as well as managing any constraints.

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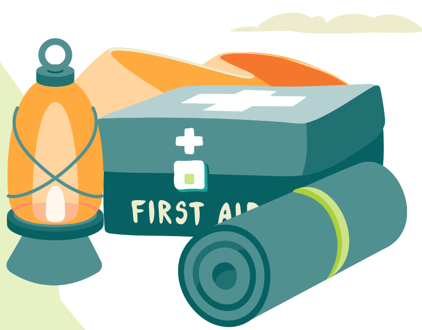
Ready to begin?

I've organized this book so that it is easy for you to dive into different topics depending on your area of need and expertise. If you're new to needs analysis work, however, I recommend looking through the content in order, as this is how you will carry out the work.

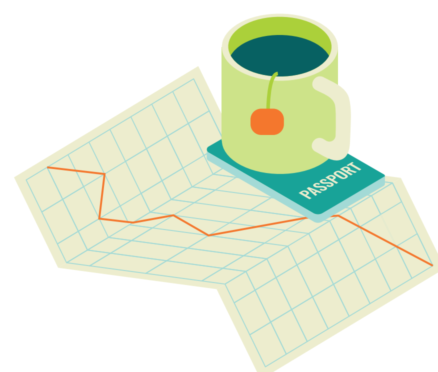
What is your need?

I need to talk to stakeholders about the business needs and expectations. Check out chapter 1, where I'll share the six questions you need to ask stakeholders before starting any training project.

I need to understand more about constraints. Chapter 3 is the place to be! Here, I'll help you to anticipate what, if any, constraints (scope-, time-, and cost-related) you should consider when preparing your recommendations.



I need to find out what the learners want from the experience. Head to chapter 2, where I'll show you which three areas will give you the most insight. I'll also provide tips for conducting empathy interviews with learners.



I've completed my analysis—now what? Skip on over to chapter 4 where I'll show you how to present your findings and recommendations in a needs analysis report. I'll also help you structure your report and improve its readability.

You have your heading. All that's left is to wish you a bon voyage!

Emma Klosson

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ADDIE—it's been around forever; is it still relevant?

My answer is a resounding yes!

While there have been many iterations of instructional design models over the years, ADDIE still stands the test of time for me. Why? Because it provides a framework for all of the activities that need to be undertaken or considered when designing learning solutions: analysis, design, development, implementation, and evaluation.

And it's flexible!

People often dismiss ADDIE because they see it as a linear model that must be followed in order at all times, whereas I see it as something that is much more flexible. For me, ADDIE serves as a useful reminder of all of the things I need to think about and do during my own process of learning solution design. How I go about conducting each of these activities—whether it's by following a step-by-step waterfall approach or proceeding in a more agile way—will vary, depending on the specific project I am working on. What's important is that I make my way through the framework and think about each activity.

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Our CoDesign workshop is a great example of the ADDIE model's flexibility. During this highly collaborative experience, we bring together stakeholders, learners, learning designers, creative directors, and course developers to work through the first two activities of ADDIE (analysis and design) using design thinking practices and methodologies (empathize, define, ideate, prototype, and test). The end result? A working prototype that not only addresses the needs of the business and the preferences of the learners but can also be developed and implemented within the project's defined constraints.

CoDesign is an agile process that takes place over 2–3 days (if done in person), with additional time for prototyping and testing. During those 2–3 days, we still invest the most time on the needs-analysis (aka "empathize and define") piece of the process to make sure that everything else that follows is a success.

When we helped the client think through their audience needs, it became clear that they needed something beyond eLearning to solve their problem. In the end, we might only produce the eLearning, but they understand the support pieces they need to implement for true success.

—A SweetRush Instructional Designer reflecting on a CoDesign experience

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Chief Client Solutions and Marketing Officer

CALL 415.647.1956
WRITE info@sweetrush.com
READ www.sweetrush.com

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Chapter 1:

STAKEHOLDER ANALYSIS

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A few years ago, a client approached us with a request for proposal (RFP) that went something like this:

"We want you to help us create a gamified onboarding experience!"

The client shared information about their company's mission and values; they described their audience; they worked out their budget; they even knew which game they wanted to style the experience on. So far, so good. Or so we thought, until we read the RFP a little closer and noticed this detail:

> **We want the onboarding experience to boost employee engagement and reduce attrition.**

The client noted that the number of staff leaving the company was increasing, year upon year. They attributed this statistic to a lack of employee engagement.

While onboarding programs can go a long way toward motivating and engaging employees, their main purpose is to orient new hires to important information about the company:

- Mission, vision, and values
- Organization and structure
- Products and services
- Policies and processes
- Benefits programs

Ultimately, these programs strive to make the new hire feel that they made a great choice by joining.

Engagement and attrition, on the other hand, are usually tied to emotional and social aspects of the job:

- Having a clear sense of purpose[2]
- Feeling valued
- Having positive relationships with management and leadership

These metrics are typically captured after onboarding ends and employees have spent a few weeks or months in the workplace actually figuring these things out.

Something didn't add up.

2. https://www.gallup.com/workplace/285674/improve-employee-engagement-workplace.aspx

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We knew that an onboarding program wouldn't solve the client's needs as a stand-alone solution. So we asked the client two simple questions:

1. Do you know why people are leaving?
2. What does your latest employee engagement survey say?

Sadly, the client either didn't know or couldn't tell us the answers. They just wanted the new v program.

This response spoke volumes to us. Not only did it tell us that our client was an order-taker, but it also communicated some of the client's other challenges:

- **The client didn't clearly understand the stakeholders' needs or what was driving the training need.** Although they knew the desired outcome, they couldn't identify the root cause of the problem.

- **The client couldn't recognize the disconnect between the desired outcome and the proposed solution.** In other words, they couldn't see that attending an onboarding program—no matter how innovative and exciting—would not prevent their employees from leaving the company if they felt unhappy or disengaged. The two things are not connected.
- **The client hadn't considered how they would evaluate the success of the program.** If they could not fully understand the behaviors driving the need, how could they isolate and evaluate the impact of the training?
- **The client was prepared to risk losing trust and credibility with the stakeholders by giving them what they wanted.** Blindly and without question.

Building trust is not about giving the stakeholder what they want. It's about giving the stakeholder what they need.

While we didn't end up partnering with this client, I like to think that we inspired them to spend additional time investigating the true cause of their employee turnover. It's equally likely, however, that they chose to partner with another vendor who didn't ask the same questions we did and just gave them what they wanted—even if it wasn't what they needed.

What the stakeholder wants and what the stakeholder needs are often two very different things. Your job is to help them see the difference.

I know by now you're probably wondering, "How do I tell my stakeholders that what they want isn't necessarily what they need?"

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The simple answer is, you don't tell them. **You consult with them.** You spend time with them and ask questions to fully understand what they want, so that together, you and the client can uncover what they need. And, as a bonus, you will build relationships, establish credibility, and gain each other's trust throughout the process.

How is this feeling so far? Overwhelming? Scary? Exciting? Whatever you're feeling, I encourage you to take this journey with me. You have nothing to lose and everything to gain by building and applying this expertise.

So, how do you consult with your stakeholders? What are the right questions to ask? And what do you need to know to steer the conversation and influence their decisions?

I've got you covered! I've compiled six questions that you should ask your stakeholders every time they come to you with a training request. I've also explained why these questions are important and what you will find out by asking them.

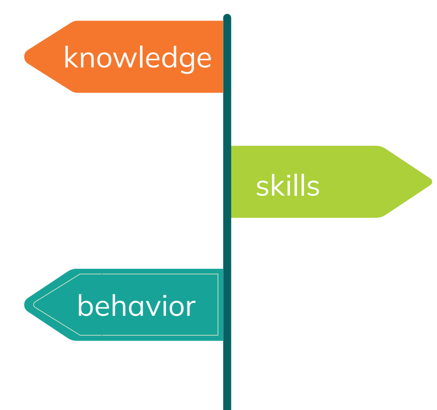
Are you ready? Let's go!

Six stakeholder analysis questions to set course for success

Question 1: **What is the training need? What has driven this request?**

There are many reasons for training. Some are straightforward, such as the need to teach people new methodologies, processes, tools, or systems. Others are more nuanced, such as a desire to improve leadership skills, customer service, soft skills, and other behavioral areas.

All training needs are either about advancing people's **knowledge** and **skills** or about changing their **behavior**. Any needs that fall outside these areas shouldn't be classified as training needs or, at least, they shouldn't be classified as something that training alone can impact.



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So, how do you get your stakeholders to talk about knowledge, skills, and behaviors?

When your stakeholders come to you with solutions—and they will!—you'll need to steer the conversation to focus on the underlying *problem*. Let me show you how:

I need your help getting some CRM training for the sales team.

Okay, I'm sure I can help. First, can you talk to me about what's going on? What are you noticing? What, specifically, is the problem?

When you ask your stakeholders to describe *what's going on*, they'll be forced to respond in a way that addresses performance:

Well, some of the team are doing okay, but others are struggling to sync their email. And none of them are exporting their data. I need everyone to be using the CRM consistently, and they aren't.

It's an easy but effective technique, right?

The information you have now is so much more revealing than what you started with ("I need CRM training for the sales team"). You now have a better sense of the specific problem and whom it's affecting. It still doesn't reveal the full picture, but you now have a jumping-off point to explore the need further with the stakeholder.

If the stakeholder can't speak to or define the knowledge, skills, or behavior gaps, it's a sign that training might not be needed or is not the right solution.

Here are some other things you can ask stakeholders to get to the root cause of the training need:

- Why do you think this is a need? What might be causing the problems you're seeing? (Try to stay focused on knowledge and skill gaps and behaviors.)
- How long has this (the problem) been going on?
- Is this a new need? Has something changed or happened recently that has caused performance to shift?
- Is the target audience aware of the problem? Have they asked for help?

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- Is this problem affecting everyone, or just some people? Why do you think that is?
- Have you tried to resolve this in any other way? What, if anything, has worked so far?

Getting answers to these questions will make such a big difference for you. When you start uncovering what's prompting the need for the training, you can start consulting your stakeholders on the right solutions.

Question 2: **What are the desired outcomes? What does success look like?**

Desired outcomes are different from but connected to the learning objectives that will eventually steer your solution design. It can be easy to mix up the two, so here's how I like to distinguish between them.

Like learning objectives, desired outcomes should be observable or measurable. The main difference is that learning objectives are, according to the Kirkpatrick Model,[3] typically defined at the learning level (L2) or behavior level (L3) and are usually related to a task or job, whereas desired outcomes are defined at the business level (L4) and are related to results.

Here are some examples of **learning objectives.**

L2 examples:
- List the steps for completing a new customer entry in the CRM.
- Explain the difference between a "sales lead" and a "qualified buyer."

L3 examples:
- Update and maintain customers' contact information in the CRM at all times.
- Upload signed sales agreements to the "contracts" module of the CRM within 24 hours of receipt.

And here are some examples of **desired outcomes** (all are L4):
- Increase sales pipeline visibility and accuracy.
- Decrease sales pipeline delays.

Here are more examples of desired outcomes:
- Increase or improve:
  - Customer experience ratings
  - Production of widgets
  - The use of in-the-moment coaching conversations
- Decrease:
  - Customer complaints
  - Warehouse accidents/incidents
  - The use of performance improvement plans

3. https://www.kirkpatrickpartners.com/Our-Philosophy/The-Kirkpatrick-Model

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Note that in every instance, the objectives and desired outcomes are observable or measurable. Why is this so important to get right? Because both the desired outcomes and the learning objectives drive the evaluation strategy. (For more on evaluation strategy, see question 5.)

Some desired outcomes will be much easier to define than others. But if you dig deep enough, you will find them. I promise you!

In the meantime, why not use the examples I shared to help stimulate some discussion and ideas? Better yet, why not go back to some of your recent projects and see if you can identify the business outcomes for those?

By asking the following questions, you can help your stakeholder define the desired outcomes:

- What impact are you hoping this will have on the business?
- Where are you hoping to shift the needle from and to?
- What is the difference you are hoping to see or measure?
- How will we know that this solution was successful?
    - What reports can we run?
    - What metrics can we assess?
    - Whom can we talk to?
    - What should we look for?

When you can clearly define the desired outcomes, you'll have a greater chance of designing a solution that will add value and create impact. And when you can do those things, you will gain the trust and credibility you deserve!

If your stakeholder can't define the desired outcomes, you won't be able to measure the impact. If you can't measure the impact, how will you demonstrate value?

Question 3: **Who is the target audience?**

I know, this is an obvious one, but stay with me. There are a few insights to be gained here that could save you time down the road.

Knowing who the target audience is will help you prepare for the learner audience analysis. It will also help you determine whether you need to adapt your solution for different audiences.

If your target audience is limited to the members of one group or team, you'll know that you can tailor the content and message specifically to them. If your stakeholder identifies more than one audience, however, you'll need to ask whether there is a primary audience among that group and, if so, who the secondary and tertiary audiences are.

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This way, you can ensure that the needs of your primary audience are met first. You can then adapt the content to the other audiences afterward as needed.

Asking your stakeholder these questions can help you define the target audience:

- Who is the target audience? Who needs this training most?
- Will this training be made available to anyone else? Who else might benefit from this training?
- Are the secondary audience's needs different from those of the primary audience? In what ways?

Question 4: **What should they (the target audience) be doing?**

This question is actually two questions in disguise. How? As soon as you ask, "What should they (the target audience) be doing?" I guarantee that your stakeholders won't be able to resist also telling you what they are currently doing. And when you know the answer to both of those questions, you'll have your performance gap. And when you know your performance gap, you can define the learning objectives. Bingo!

Before you get too carried away, know that it's important to get specific here. Don't settle for vague responses. Press and prod your stakeholder if you need to. The better you understand the desired behaviors, the greater your chances of crafting learning objectives that close the gaps.

To determine the performance gap, ask:

- What should the target audience be doing?
- What is the target audience doing right now?

If the stakeholder gets stuck on this or finds it hard to come up with specific examples, change how you're asking the questions:

- If I were to visit them (the target audience) in the workplace after the training, what should I expect to notice, see, or hear?
- If I were to visit them (the target audience) in the workplace right now, what would I notice, see, or hear?

Rephrasing the questions in this way not only helps trigger a response but also shows the stakeholders that you're committed to understanding and resolving the performance issue at hand.

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Question 5: **How will we measure success?**

And now for the bit that most of you dread—am I right? I understand, evaluation can feel like a daunting prospect to tackle. But if you want to build trust and become a valued partner, you simply can't ignore it.
Trust me.

You don't have to do it all yet
Remember, we're still at the A in ADDIE. At this stage, all you need to determine right now is **the evaluation strategy you are going to use**. Assuming you're using the Kirkpatrick Model,[4] will it be Level 1, 2, 3, 4, or a combination? How you design, develop, and implement the strategy comes later in the (ADDIE) process. And even then, if you're still feeling anxious about how to get it done, you can and should ask for help. Just be sure to call this out in your needs analysis report when you're discussing the project constraints and requirements (see chapter 3 for more on this).

> **Your evaluation goal during the needs analysis stage is simple: help the stakeholder choose the most appropriate and robust strategy.**

How do you have that conversation?
Again, this part is easy. You'll facilitate this discussion in the same way you would any conversation that leads to decision-making.

First, you present the options. **Next, you offer your expert opinion.** **And last, the stakeholder makes the final decision.**

Your role is to influence that decision and help the stakeholder choose the most appropriate and robust strategy.

To help inform their decision, make sure you discuss the following:

- **Evaluation options:** Share examples of the types of activities you might design to measure at each level.
- **Benefits of evaluating at each level:** Reveal the insights and results that each level of evaluation will yield.
- **Effort involved at each level:** Call out what it might take to design, develop, and implement the activity or approach. Don't forget to factor in what it will take to capture and analyze the results.
- **Risks of not doing an evaluation:** (This is the big one and helps influence the decision-making.) Emphasize the value of the evaluation strategy by calling out what might be at stake if you don't measure results or impact.

Need more help with this? Check out the appendix for a guide to each evaluation level.

4. https://www.kirkpatrickpartners.com/Our-Philosophy/The-Kirkpatrick-Model

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Mind the evaluation gap

Sadly, evaluation is a catch-22 for most learning professionals.

- ✓ You want to become a trusted partner to your stakeholder.
- ✓ You want to be able to measure the impact of your training solutions.
- ✓ Your stakeholders want to see the impact and value of the training.

However, here's the reality:

- ✗ Stakeholders rarely want to invest in anything beyond an L2 evaluation.
- ✗ Learning professionals don't always have the confidence to implement evaluation strategies.

A recent study by the Learning & Performance Institute (LPI) revealed the top five strengths and weaknesses of learning professionals.[5] What skill do you suppose was sitting at the top of the list of weaknesses? You guessed it: evaluating impact. LPI describes the profound negative effect of not being adept at evaluation:

When L&D lacks the skills needed to define, collect, and assess the data that proves learning efficacy and impact, it not only lacks the insight required to inform learning strategy but also the influence to improve organisational decision-making.[6]

It's a worrying trend that brings us back to the vicious circle I talked about in the introduction.

So, how do you get around this?

You need to initiate more conversations about evaluation with your stakeholders and persuade them to make the right choices.

If you're not feeling confident about discussing evaluation with your stakeholders, get support from colleagues or partners who do, and continue to build your skills in those areas.

5. https://www.thelpi.org/resources/ld-dashboard/#professionals.
6. https://www.thelpi.org/resources/ld-dashboard/#professionals.

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Remember: All you need to figure out right now is which level—or combination of levels—you will measure against. The details can be decided later on.

Are you feeling a bit better about evaluation? I hope so. Before we move on to our final question, I want to share a few crucial things I've learned over the years about evaluation.

My golden rule:

You should always initiate discussions with your stakeholders about the evaluation strategy, regardless of the size or scope of your training initiative. Why? It comes back to relationship-building, credibility, and trust. When you initiate the discussion, you show your stakeholders that you care about the efficacy and impact of the solution. And they will be glad that you did.

A couple of busted myths:

1. **Not all L4 evaluations are difficult to implement.** L4 evaluations can be incredibly straightforward, particularly if you're measuring customer satisfaction ratings, production levels, sales, and the like. Where things can get tricky is in isolating—aka proving—the impact that the training had on the result. There are ways to do this—for example, control groups—so don't let it put you off discussing this as a strategy.

2. **Not all L1 evaluations are easy to create.** On the opposite end of the spectrum, it's worth noting that a valuable and reliable L1 evaluation requires time and effort to get right. Don't underestimate the work that goes into creating a good reaction-level evaluation tool. Make sure you factor in the appropriate time and resources in your report and project plan.

Question 6: **What might enable or derail the success of the solution?**

Have you ever attended a training that really resonated with you? Maybe you learned about a new approach or a time-saving tool that you couldn't wait to try. It's a great feeling, right?

Now imagine you're back at work, and your bosses are telling you that you can't make the change or apply the learning. Perhaps your organization isn't quite ready to move in that direction, or maybe you need some tools and infrastructure in place first. Maybe it isn't the organization—maybe the people are standing in the way, and maybe they aren't ready for change.

How would that make you feel? Pretty frustrated, right? I mean, what a massive waste of your time, not to mention the company's money.
Luckily this never happens—right?

Actually, it happens more often than you think.

As learning professionals, we spend so much time thinking about success in terms of outcomes and impact (all the stakeholder analysis questions we have shared so far have been focused on just that) that we sometimes forget to think about the things outside of the solution that can enable or derail its success.

Interestingly, the things that enable success can also be barriers.
Let's take a look at what I mean.

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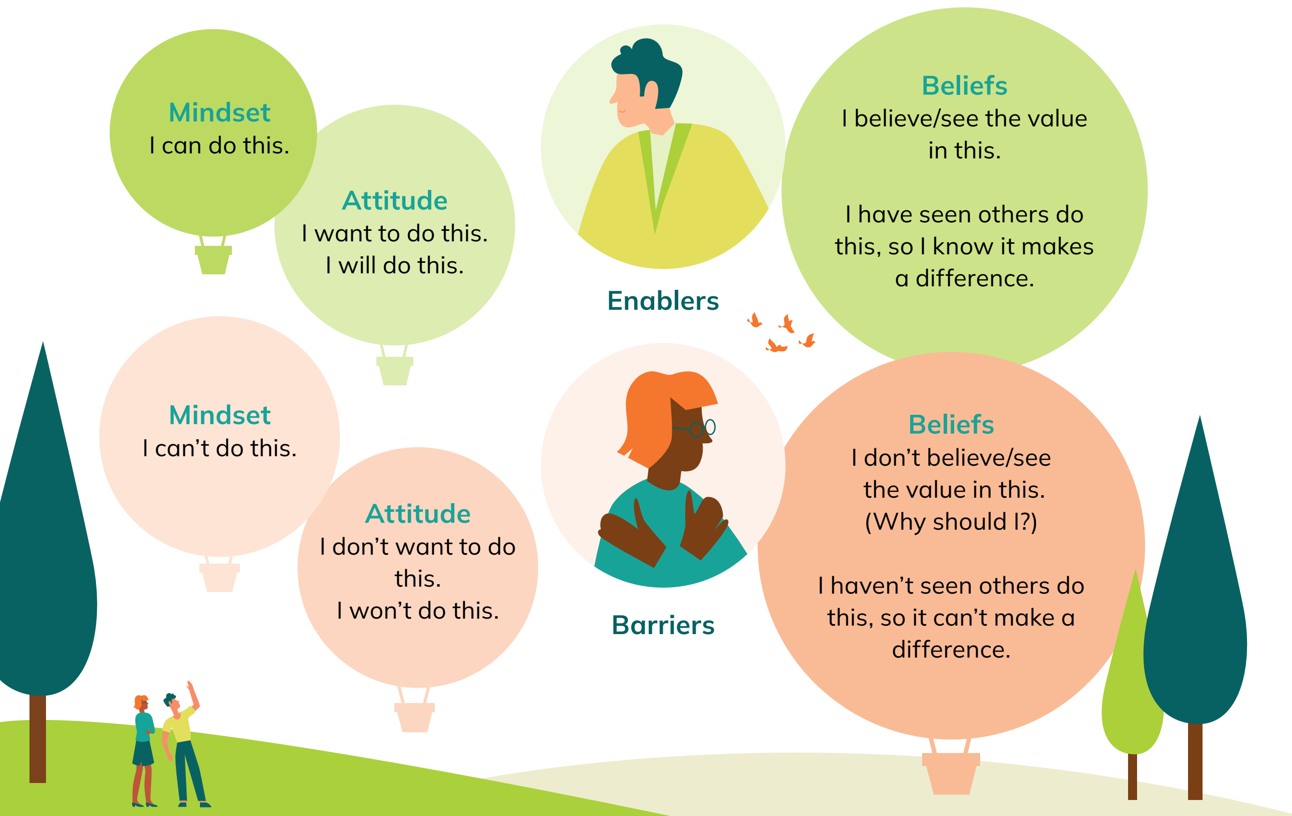
Internal enablers and barriers

In this instance, "internal" relates to the people taking the training, your learner audience—specifically, their mindsets, attitudes, and beliefs.

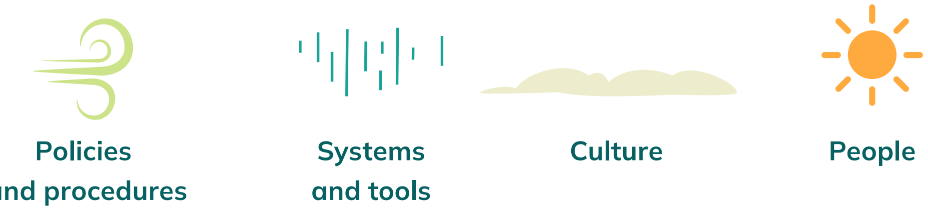
Changing people's attitudes isn't easy. You can, however, shift mindsets, and you can acknowledge and influence people's beliefs. You just need to know what they are first.

Ideally, these internal factors should be captured during your learner audience analysis, but it's also a good idea to get the stakeholders' perspectives because they can often see things that the learners cannot.



External enablers and barriers

External enablers and barriers can determine whether the learner applies the learning. Such factors, including the following, are outside the learners' control:



When any of these act as barriers, you'll need to address them with your stakeholders and explore removing them or working around them. Be sure to include these findings and recommendations in your learning needs analysis report.

Here are some questions to ask your stakeholders:

- What, if anything, will enable the success of the training solution? (Internal? External?)
- What, if anything, could be a barrier to its success? (Internal? External?)
- What might be causing the target audience's current mindset, attitude, or beliefs?
- What will we need to put in place to support the application of the learning? (for external barriers)

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What does this analysis reveal?

Think of the stakeholder analysis results as your North Star. The knowledge and insights you capture here will steer everything that follows—not only in the rest of the needs analysis but also throughout the process of designing, developing, implementing, and evaluating your learning solution. Your stakeholder analysis contains crucial information:

- What has driven the need: knowledge and skill gaps or performance-related issues
  And what the problem is that you are trying to solve
- What the desired outcomes are and how these impact the business
  And what success will look like
- Who the target audience is
  And whether you need to consider other audiences' needs either now or later in the process
- What the performance gaps are
  And what your learning objectives should be
- Which evaluation strategy you need to implement—L1, L2, L3, or L4
  And how you will measure success

Above all, the stakeholder analysis will give you the answer to the $10 million question: **Will training solve the problem?** And what, if anything, will you need to ensure success (business champions, change management strategies, updates to policies or procedures, mindset shifts, etc.)?

In chapter 4, we'll show you how to present these findings and synthesize the data to inform your recommendations.

Meanwhile, check out chapter 2 to find out how to uncover your learner audience's needs. We'll also focus on the importance of connecting and empathizing with your learner audience so you can create the best possible experience.

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In a pinch? Here's my stakeholder analysis shortcut.

The best practice for conducting a stakeholder analysis is to work through all of these questions with your stakeholder, one by one, ideally in one sitting. Not only will this help you build momentum and connect the dots as you're uncovering information, but—more importantly—it will help you develop a relationship with them.

That said, I know how busy everyone—including you—can be. Here is my stakeholder analysis shortcut for those who don't have the luxury of meeting with their stakeholder.

1. **Prepare a questionnaire.** Be sure to provide context and examples that help your stakeholder see exactly what you're looking for.
2. **Give the stakeholders a reasonable amount of time to complete the questionnaire.** Set a deadline and follow up as needed.
3. **Review the stakeholders' answers.** Document the answers that make sense, and flag any questions that you need to revisit or get clarity on.
4. **Schedule a follow-up call to discuss the stakeholders' answers.** Do not skip this step! Even if your stakeholder has answered all the questions perfectly, it is so important that you (1) thank them and (2) demonstrate that you have a clear understanding of their need. This is how you build relationships and earn trust.
5. **Ask the stakeholders if they have any questions or want to add anything.**
6. **Thank the stakeholders for their time and support.**
7. **Move your findings to your needs analysis report.**

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Chapter 2:

LEARNER AUDIENCE ANALYSIS

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I'll tell you what I want, what I really really want.
So, tell me what you want, what you really really want...

Now don't go wasting my precious time
Get your act together we could be just fine...

I won't be hasty, I'll give you a try
If you really bug me then I'll say goodbye...[7]

The stakeholder analysis covered in chapter 1 provides a North Star for your learning solution. The learner audience analysis gives you what you need to ensure that the journey—wherever it may take the learner—is both enjoyable and worthwhile. That's our focus in chapter 2.

There's a reason why we're seeing an upsurge in roles and departments such as Customer Experience Manager and Customer Engagement teams. These days, the product itself is no longer the be-all and end-all: **The customer experience is king.**

7. "Wannabe" lyrics © Sony/ATV Music Publishing LLC, Universal Music Publishing Group, Peermusic Publishing

This problem is not exclusive to products that can be bought and sold online.

One of my favorite places to eat is a seafood restaurant in the city near where I live. Both the location (it's tucked in a winding, fairy-light-strewn cobbled lane) and the decor (clean white tiles, marble-topped tables, and brass ceiling lamps) are gorgeous. The service is impeccable. The staff are knowledgeable about the menu and are always on hand to offer suggestions. Above all, the food is cooked to perfection. I have never had a bad meal there. Not once.

So why is it—if the place is as good as I'm describing, and it is—that I rarely eat there anymore?

Well, for starters (pardon the pun), parking is a nightmare. Also, the restaurant doesn't take reservations. No exceptions. You have to take your chances and turn up to see if a table is available. This is all well and good if you have plenty of time and don't mind waiting, but it's not so great if you have a movie or show to get to afterward.

The restaurant also has communal seating, which is great if you're feeling sociable, but not so great if you want to spend an intimate evening with your dining companion.

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And so, it's this entire experience—and not just the idyllic location, impeccable service, and perfectly cooked food—on which I now base my decision whether to go to this restaurant or not. I find myself asking: Do I want to take the train and walk miles, or drive and pay a small fortune in parking? What is my current hunger level—do I need to eat right away, or could I wait an hour or more if I had to? Do I feel like socializing with other people or not? More often than not, I'll pass.

I'll pass! Even though I know the food will be heavenly, I will forgo this little gem of a place—which makes the best mussels in white wine cream sauce this side of Belgium—in favor of something that is "easier" for me. I'll sacrifice the "product" (my delicious meal) for an experience that is better for me.

So what, I hear you ask, does all this—and the Spice Girls, for that matter—have to do with needs analysis?

It means that it's no longer good enough to focus solely on the quality of product you are creating. Learners also want and need experiences that are convenient, meaningful, hopefully enjoyable, and always satisfactory.

You need to create a quality learning experience that your audience will really really want.

Reflect on your experiences.

Think about your own experiences buying consumer products.

Have you ever given up on a transaction, or even abandoned a once-loved brand, because its website experience wasn't user-friendly?

Perhaps the process of putting something in the shopping cart was cumbersome. Maybe the shipping process wasn't transparent and you couldn't track your delivery. Maybe you couldn't get ahold of the customer service team? Whatever your story might be, I bet that you weren't thinking about the product anymore. You were thinking about the experience and whether it was worth your while to go through.

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To be clear, I'm not suggesting that you throw out everything you know about the desired outcomes, learning objectives, and performance requirements. Remember, these are your North Star. But I am telling you that if you fail to meet the learners' needs and expectations of what they consider to be a good learning experience, they are far less likely to be engaged.

Why does engagement matter?
Learners who aren't engaged are less likely to learn. And when learners don't learn, they won't change their behaviors. And when behaviors remain the same—you guessed it—your solution will fail. And—boom!— just like that, you will lose that all-important trust and credibility you have been building with your stakeholders.

This all sounds pretty dramatic, but I am not prone to theatrics, so please trust me when I say that the learner experience is a Very. Big. Deal.

Luckily, it's easy to lay the foundation of the right learner experience during your needs analysis. And I will be here every step of the way to help you chart a course for success.

In this chapter, I will share:

- What aspects of the learner experience you should be thinking about
- Who you need to talk to
- How and where to engage with the learners
- What information you should obtain from and about them
- How to frame your questions in a way that enables them to freely express their wants and needs

Are you ready? Let's dig in!

In a pinch? Check out my shortcuts at the end of the chapter to find out how to scale back your learner audience analysis.

What makes a great learner experience?

There are various definitions of learning experience and learning experience design out there. What most of them have in common is a focus on human-centered design.

What do we mean by human-centered design? I like this definition from IDEO:

> ***Human-centered design is a creative approach to problem-solving. …It's a process that starts with the people you're designing for and ends with new solutions that are purpose-built to suit their needs.***
>
> ***Human-centered design is about cultivating deep empathy with the people you're designing for; generating ideas; building a bunch of prototypes; sharing what you've made with the people you're designing for; and eventually, putting your innovative new solution out in the world.[8]***

8. https://designthinking.ideo.com/faq/whats-the-difference-between-human-centered-design-and-design-thinking

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What this means for L&D is that we need to shift our approach to learning solution design from one solely focused on outcomes to one that also takes into consideration the learner experience.

To do this, we need to c**ultivate empathy with our learners, which means getting to know them and finding out how they like to learn.** With these firsthand audience insights, you'll be able to make recommendations and design solutions that are "purpose-built to suit their needs."

At SweetRush, we have wholeheartedly embraced this human-centered approach to learning solution design. Our Learner-Centered Design (LCD) standards build on the premise that people learn when they want to learn, and when they value the learning and provide a framework and language for discussing the learner experience.

Why it's important to get your facts straight from the source

With the best will in the world, stakeholders and managers will try to "help" you by telling you things like: I know these learners well, I've worked with them for years; or, I know what they will respond to. But the truth is: No one can tell you how the learners like to learn but the learners themselves. Think about it for a moment.

Have you ever made a recommendation to someone you thought you knew really well only to find they didn't respond in the way you expected? Maybe it was a film or book you thought they'd love. A place they should visit. Maybe you've been on the receiving end of a gift or recommendation from a loved one and thought: "What were they thinking? They don't know me at all!"

While knowing someone well can help narrow down your chances of getting things right, you need to keep in mind that we are all different, and we are all constantly changing and evolving. Something that was relevant one day under one set of circumstances may change the next.

How many people do you know who have changed their diet recently? Whether voluntarily—like adopting a plant-based diet to help the environment—or involuntarily—like developing a food allergy. People change all the time; therefore, we can't make assumptions based on what we believe we know or knew about someone.

Regrettably, this won't stop stakeholders or managers from telling you what they believe the learners' needs and preferences are. In this instance, the best response is to say thank you and to explain you'll still need to meet with the audience to find out more details. Then, when you meet with the learners, you can ask your own questions and find out whether the stakeholder assumptions match up or not.

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Five steps for conducting a “zigazig ah” learner audience analysis

Are you ready to give your learners what they really really want? Not sure where to start? Here are five (Baby Spice) steps to help you get started with your learner audience analysis.

Step 1: **Identify who you will meet with.**

With one exception—see step 3—it is vital that you carry out your learner audience analysis by talking to the learners themselves.

Who should I meet with?

Your goal is to meet with a representative sample of the target learner audience. The larger your audience, the larger the sample should be. Work with stakeholders and managers to identify suitable candidates.

Who do I talk to when the learning solution is about addressing performance?

If your training needs are focused on specific performance issues—like our CRM-avoiding sales team in chapter 1—you’ll want to strike a balance between finding more seasoned/experienced individuals to talk to as well as those who are newer/less experienced. Each group will bring forward different perspectives.

When you’ve identified who is who, arrange separate meetings with each group according to their experience. This is important because newer or less experienced individuals have a tendency to repeat or agree with their more experienced peers, which is not helpful when you are trying to get to the bottom of a specific performance issue. You need to obtain authentic, reliable insights and data about the performance issues and not what people think they should be doing—or worse, what they think you want to hear.

What if my target audience is the whole company?

If the target audience is everyone—and you have confirmed this during your stakeholder analysis—you’ll still need to try to speak to a representative sample.

Let’s say you are putting together a new onboarding program. The organization is global, with numerous divisions, functions, roles, and levels of seniority spread out across different locations. You’ll need to capture the wants and needs of as many different people as possible.

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Ask stakeholders to identify a cross section of individuals that span different locations, divisions, roles, seniority, and tenure. When you are dealing with a large, diverse audience, you can expect their needs to be equally diverse.

Don't forget about your secondary and tertiary audience.
Your main focus should be on identifying the primary audience's needs. However, if the secondary or tertiary audience is very different from the primary audience you will also need to connect with them to find out what they know and how they like to learn.

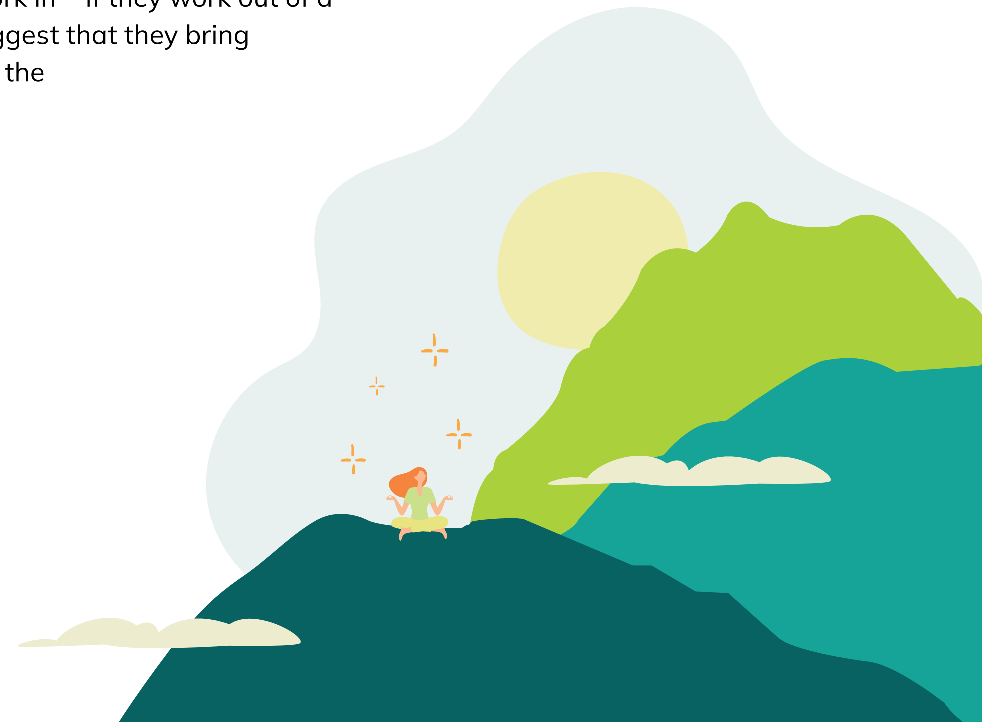
Step 2: Set up face-to-face meetings away from the workplace (unless you need to see them at work).

Meet them face-to-face.
Human-centered design requires that you cultivate deep empathy with the people you're designing for. The best way to develop empathy for others is to spend time with them—preferably, face-to-face and in person.

Of course, it's not always possible to get together in person with your learner audience, particularly if your business is geographically or globally dispersed. Videoconferencing—with the emphasis on videos turned on—is, therefore, a worthy second-place choice.

Meet them away from their workplace.
With the exception of observing the learner on the job—which I'll come back to in a moment—you should always arrange to meet the learner away from the work environment if you can. In addition to removing any work-related distractions during the conversation, you will also create a safe space where learners can speak more openly about what's going on.

Remove distractions.
To create the illusion of escape, ask your learner to prepare for the session by removing as many distractions as possible. Ask them to finish up tasks and set email and instant messaging apps to "do not disturb." You could even ask if they are able to move their computer to a space they don't usually work in—if they work out of a home office, suggest that they bring their laptop into the living room.



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You want them to feel safe to speak freely about their preferences without being reminded or encumbered by workplace constraints.

Make sure you have stakeholder or manager support here. Ask them to make provisions where necessary—by taking call center staff off phones, excusing people from manual duties or team meetings, etc.—to allow these conversations to take place.

Observe them at work only if you have to.
The one exception to this rule would be when you want to observe learners in their work environment (see step 4). In this instance, it might be critical to see learners at work. Perhaps you need a better understanding of the role or physical or logistical constraints they deal with on a daily basis. Maybe you want to see how they access and use job aids and performance support tools. Or perhaps you want a better understanding of how they apply judgment and decision-making skills in the moment. If this is the case, there is no better way to capture this insight and data than seeing it with your own eyes.

The caveat is that observation should supplement and not replace a separate conversation with learners to find out how they like to learn.

Visit them at work to see the challenges they face there, but set up a separate meeting, away from work, to talk more candidly about how they like to learn.

Using Questionnaires and Surveys to Capture Learner Using questionnaires and surveys to capture learner audience data and insights
If you absolutely cannot meet with your learners face-to-face, you could capture their input using surveys and questionnaires. There is quite a bit to take into consideration if you do head down that route.

Check out the appendix for help getting started on this.

Step 3: **Find out what their work life is like.**

This is the one and only part of the learner audience analysis process that doesn't need the target audience's participation.

What you're looking for in this step is purely logistical. You want to understand what the learner's typical work day looks like so you can figure out the best way to fit learning into it.

Since this is something that a stakeholder or, more likely, a line manager or even subject matter expert (SME) can tell you, my advice would be to get this information directly from them. You can then spend whatever time you have available with the learners, finding out about what they know (step 4) and how they like to learn (step 5).

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I've mentioned SMEs here, but this is not an SME interview. You're not trying to find out details about the learners' day-to-day tasks in order to craft role plays or scenarios. That work will come later on, during the design stage. All you need to know at this point is this:

- **Where do they work?** What are the general conditions? This is important if you are developing a solution that learners take on a desktop or mobile device. Can learners access that device easily?
  Will they need to access audio? Is there a lot of noise that could distract them?

- **What tools and technology do they have at their disposal that could be used for learning?** Similar to the above, you need to know if learners have access to tools or technology—such as desktops, mobile devices, headphones, and even a user ID on the LMS—that facilitate learning.

- **How easy is it for them to step away from work to take or attend training?** Are the learners in a role that allows them to step away for short or long periods of time—including travel if necessary—to take or attend training? How much time can people spare/be spared for? Is it better/easier to have them step away once for a prolonged period of time, or could they squeeze 10-15 minutes of training into their day every day?

Ultimately you are on a mission to find out how easy it is for the learner to stop work and take training, for how long they can be spared, and what, if any, tools and technology they have at their disposal.

Conflicts will arise—ignore them for now

This is probably a good place to call out the fact that, as you dig into the learner audience analysis, you will almost certainly uncover conflicting information.

You may find out that learners prefer to get together with others in a classroom to learn, but that they can only step away from their desk for 15 minutes at a time to take training. Maybe you discover that they prefer online learning, but don't have access to a computer at work.

Remember that the needs analysis process is about uncovering all of the wants and needs so that you can see the big picture. It is only when you have gathered all the data that you can begin to synthesize your findings and make recommendations. Try to handle each piece of information that you gather as a separate artifact and resist the temptation to use what you know to steer or otherwise influence the rest of your analysis.

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Step 4: **Find out what they already know and can do.**

If you are developing a learning solution to teach a specific behavior or address a performance issue, it will be critical to find out what the learner audience already knows and what they can do—as well as what, if anything, is helping or hindering their performance.

If you recall, we started some of this work in the stakeholder analysis by asking these questions:

- What should they (the learner audience) be doing?
- What are they currently doing?
- What, if anything, is enabling their performance (internal and external)?
- What, if anything, is a barrier to their performance (internal and external)?

The first two questions helped identify the performance gaps, and the last two questions helped to establish whether training alone will solve the problem.

You can now use the information you gathered from the stakeholders as a jumping-off point to validate what they told you and drill down for more details with the learner audience.

For the performance gaps

You'll want to find out if the gaps are the same for each learner. And, if the gaps are different, what does that look like for each person? What, if anything, might be causing those gaps to be different?

For the enablers and barriers

You'll want to balance what you heard the stakeholders tell you with the learners' perspective. The learners will almost certainly be focused more on the external factors—the people, processes, policies, systems, and tools—when it comes to what is helping or hindering their performance. Stakeholders, on the other hand, are more likely to see the internal factors—the learners' mindsets, attitudes, and beliefs—as blind spots to performance.

Listen objectively to both sides and use what you learn from both to help put the puzzle pieces together when you synthesize your data (see chapter 4 for more on this).

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Here are the questions that you should try to get answers to during this step. You don't need to ask the questions as they have been written—in fact, I would strongly suggest you don't—but this is the data you want to gather. See my tips in the sidebar for asking these questions a different way.

What you need to find out	Why is this helpful to know?
What training—formal or informal—have they had or needed, to do this task? When did that training take place? How has it helped?	This helps you to identify whether training was provided, to whom it was made available, when it was given (and therefore whether different versions exist), and how effective it was.
What, if any, tools or people do they rely on to complete this task?	This tells you whether they need additional support (from job aids, or even peers or leaders) to complete the task.
How do they know when the task has been completed correctly?	This tells you whether they are able to recognize when a task has been completed to successfully—And whether they have clear guidelines in place to help establish this judgment or decision-making.
What is it about the task that they find easy or difficult?	This helps you understand where people who are less confident or experienced might be getting stuck.
How would they rate their proficiency and confidence in completing this task? How did they arrive at that conclusion?	This helps you to compare and contrast your findings with those gathered from other learners. It will also help you to identify potential SME candidates.

How to lean in to curiosity instead of making an interview feel like an interrogation

Rather than grill the learners for information—which can put them on edge or make them feel like they are doing something wrong—approach your questions with curiosity.

Gently lead them to share what they know and can do by asking them questions like: "Can you walk me through this task? That sounds complicated, do you have anything to help you remember those steps? Are you able to ask your coworkers for support? Who is your go-to person when you need help or get stuck? What would make it easier to do this task? It sounds like you really know what you're doing—how would you rate yourself at this task?"

Dial up your active listening skills.

Pay close attention to what the learners have to say. Resist the temptation to finish their sentences or lead them to answers that they might not otherwise have given. Reflect back what you hear and ask for clarification when something is unclear.

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Step 5: **Find out how they like to learn.**

And now, here it is: the main attraction, the big kahuna, the mac daddy, the Saturday night divas of the learner-audience analysis. This is the part where we peel back the layers and peek into the minds of our learners. This is where we find out their training turn-ons and their learning loathes. What motivates them and what makes them want to hit snooze. Whether they are a night owl or an early bird. We want to know it all.

What you discover here will shape and inform the learning experience you design. Be sure not to skip this step. Spend as much time as you can with as many learners as you can.

Just like in step 4, you need to embrace curiosity and approach the conversation with the learners in a way that puts them at ease, rather than barrage them with a list of would-you-rather questions. Your goal is to get the learners to describe their dream experience, and for it to be unfettered and unbiased by either/or choices. Asking open questions is the key to success here.

For example:
If you ask the learner, *"Do you prefer to learn online or in a classroom?"* they will assume that these are the only options available to them. And they will pick one, whether they really have that preference or not.

A better question to ask would be, *"How do you like to learn?"* or, "*Describe your ideal learning experience."* These questions leave much more open to interpretation. And learners won't feel like they have to make a choice. Instead, they'll speak openly about their specific likes, dislikes, and preferences.

Embrace silence, but add prompts if needed.
As with step 4, you will need to lean in to your active listening skills here. When you ask open questions, people often need more time to think. Give them that space, but also notice any body language or nonverbal cues that lead you to believe the person is struggling to answer, and then—and only then—follow up with a prompt or qualifier like, "Describe your ideal **online** learning experience." You could also turn the question around and ask about a bad experience and what made it bad. Some people find it easier to access existing experiences and talk about those, rather than think something up on the spot.

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Regardless of the approach you take, try to practice keeping your questions as open as possible, and avoid giving learners options to choose between.

What do you want to walk away with?

You want to leave the conversation with a deep understanding of how your learner audience likes to learn.

What modalities and methodologies do learners respond best to?

- Do they prefer to learn independently or together with a group?
- Do they like to learn in a classroom setting or online?
- Do they like to take online training on a desktop or mobile device?
- Do they like to consume content in short bursts or all at once?
- Do they like to follow a set curriculum or discover things for themselves?
- How do they like to access learning?
- Do they like to be able to easily pick up and put down learning?

When and where do they like to learn?

- Do they like to learn at work?
- Or do they prefer to learn at home?
- Maybe they like to learn while on their commute?

What motivates them?

- Do they like to solve puzzles, overcome challenges, help others, or see their own growth and development (intrinsic motivators)?
- Do they prefer the thrill of competition and gaming with leaderboards and rewards and recognition (extrinsic motivators)?

What are their likes and dislikes about learning? What type of learning do they find engaging?

- Do they enjoy things that closely resemble their workplace and real life?
- Do they enjoy something more abstract?
- Do they enjoy immersive storytelling?
- How do they like to practice their skills?
- What makes them feel safe?
- What makes them feel uncomfortable?

Someone who is currently practicing her own skills at this technique is Clare Dygert, Chief Learning Strategist. I sat down with Clare to ask for her advice on asking learners how they like to learn without asking them how they like to learn. Here's what she had to say!

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The empathy talk show—your learners' time to shine.

Of the 21 and counting activites we have to choose from in our CoDesign workshop, no fewer than a third of them are for the empathy or "connect" stage. And one in particular—Talk Show—has become a SweetRush favorite, not only with our team but also with our clients and their learners alike.

I met with **Clare Dygert**, to find out more about it, and here's what she had to say.

Emma: What is Talk Show?

Clare: Talk Show is a technique we use to interview our learner audience so that we can find out how they like to learn.

We call it Talk Show because, when we do our in-person CoDesign workshops, we set up a little stage area that looks like a talk show set. The facilitator (aka the talk show host) greets the guests (our learner audience) on stage with a warm welcome and proceeds to interview them.

What's interesting is that, even though the conversation is being witnessed by other participants in the workshop, the talk show format makes them feel like they are having a conversation with just one person—the host—instead of the entire group, which puts them more at ease.

It's a simple but very effective technique that requires practice and skill on the facilitators' part.

Emma: What kind of questions do you ask the learners?

Clare: Well, this is where it can get tricky. As with all exercises in empathy, the goal of Talk Show is to listen for what the subject of your questioning—in this case the learner audience—wants to tell you and not what you want to know. This means crafting questions that are as open as possible and that don't lead the learner to a specific response.

Emma: Can you give an example?

Clare: Sure. Let's say I asked you, "What's your favorite dessert?" You would probably take a minute or two, and then you'd reply with a specific type of dessert.

But what if you don't really like dessert?

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Unless you felt comfortable telling me that you don't really like desserts—and most people you meet for the first time err on the side of being polite—you'll probably give me the name of a dessert that you think is okay but might not necessarily be your favorite.

The question—what is your favorite dessert?—is leading you to a specific answer. Even though it's an open question, and, in theory, you could answer any way you want, it's still forcing you to narrow your response to a specific category or type (desserts).

So how do I find out what you really like? I reframe the question. Instead of asking, what's your favorite dessert, I'll ask you to describe your perfect meal. This is a similar question; I'm still interested in what you like to eat, but I'm asking it in a way that doesn't lead you to a specific response.

Again, it's a subtle shift but very effective.

Emma: How do you determine who should take part?

Clare: We want to make sure we have a representative sample of the primary learner audience. Depending on what we are solving for, we might ask for people who fit within a specific criteria or who possess certain characteristics, but honestly, we'll take whoever we can get!

Clare: The ideal situation is to talk with learners individually, but I've also run interviews with small and large groups. The risk of involving too many people at once is that not everyone will have the opportunity to speak up and be heard. I would try to keep the numbers as low as possible and run multiple sessions where needed.

Emma: How long does it take?

Clare: We usually schedule an hour for each Talk Show interview. That said, the most important piece of advice I can give is to not rush the interview. People need time to think and process. Give them that time. I always tell new Talk Show facilitators to treat this interview like a first date. Give the audience your full and undivided attention. Listen to and hang on every word they say, and use active listening skills to show that you have heard and understood what they are saying.

Another critical piece of advice is to have someone else take notes during the conversation. You cannot run the conversation, listen and respond to your audience, and take notes and remain present in the moment. This is a deal breaker for me.

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Five more talk show tips from Clare:

1. **Open the conversation with a low-stakes question.** This could be anything from asking, “Where are you from?” to commenting on something they are wearing and asking about it. You want to warm them up and get them used to talking out loud and hearing their own voice.

2. **Prepare and print out your questions in advance (but don’t share them with your learners).** In other circumstances, you might want to give people time to prepare their responses, but in this instance, you are looking for an authentic and unscripted response. You need to be prepared by knowing what you want to ask, but you also need to be prepared for the conversation to take a different turn. It’s okay if you don’t get through all the questions. The most important thing is to let your audience talk and to build empathy. You can always follow up later with other questions.

3. **Embrace silence.** People need time to think and process. Let the silence happen and resist the urge to fill it—unless you sense that they haven’t understood the question. The best insights arise when you give people time to internalize the question before they respond

4. **Offer a heartfelt and sincere thank you to the learners at the end of the interview.** Thank them for their time and valuable contribution. Use language that will resonate with them: For example, use phrases that echo or mirror their organization’s values or brand. The point is to emphasize how their contributions tie in to the bigger picture.

5. **Don’t worry about being perfect.** This isn’t easy to do, so don’t expect to be perfect at this right away. Do the best you can and take away what you learn from each Talk Show experience to improve the next one.

Read more on this topic from Clare: Thinking About Target Audience Analysis, The SweetRush *Way*

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What does this analysis reveal?

"Oh, what do you think about that
Now you know how I feel[9]"

You certainly will have a better understanding about how the learner feels about learning. You should also have that deep understanding of:

- What they already know and what they can do
- What factors are enabling them to perform and what barriers are preventing them from performing
- When, where, and how they like to learn; what motivates and engages them; and what could be a turnoff

In chapter 4, we will look at how to synthesize this data and create an audience-insights statement. This statement helps you take the information you have gathered, the *what-you-found* and create the *what-this-means* statements that will inform your solution design and recommendations.

In the meantime, visit chapter 3 to learn about constraints and content. I'll point out all of the different constraints and needs that you should be looking at. I'll also share my tips for conducting a content analysis.

9. "Wannabe" lyrics © Sony/ATV Music Publishing LLC, Universal Music Publishing Group, Peermusic Publishing

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In a pinch? Here are my recommendations for scaling back your learner audience analysis.

While I would urge you to spend time here, it's not always easy or possible to connect with learners. I get that. So, here's how I would approach the audience analysis if you are short on time or if you aren't able to meet with all of your representative sample of learners.

1. **Try to meet with at least one learner:** I can't stress how important it is to get learner input. If you want to create great learning experiences, you need to meet with at least one learner. If you can't meet in person or by video, try to arrange a voice call. That one-hour conversation with one person will make a huge difference. Of course, the goal is to meet with as many learners as you can, but if all you can meet is one, then it's still better than meeting none.

2. **Prioritize finding out how they like to learn:** You can rely on stakeholder and manager input to find out what the learners' work life is like (step 3). And, if you're really in a pinch, you can also forgo finding out what they already know (see my next tip for gathering that information via a survey instead) and rely on what the stakeholders have already told you. Do not let anyone else try to tell you how the learner likes to learn. Put all of your time and effort here as a priority.

3. **Use surveys and questionnaires to gather information:** If you aren't able to meet with learners—or if you can only meet with a small number of them—use a survey or questionnaire to target the rest of your representative sample. See the appendix for more information.

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I'll leave you with this closing thought on learner audience analysis:

> ***You can please some of the people all of the time, you can please all of the people some of the time, but you can't please all of the people all of the time.***

— John Lydgate

Please, please keep this in mind as you gather your information. You won't be able to keep everyone happy or address everyone's needs. The important thing is to surface them. You can make judgment calls and prioritize your efforts based on what will work best for the majority when you synthesize your data.

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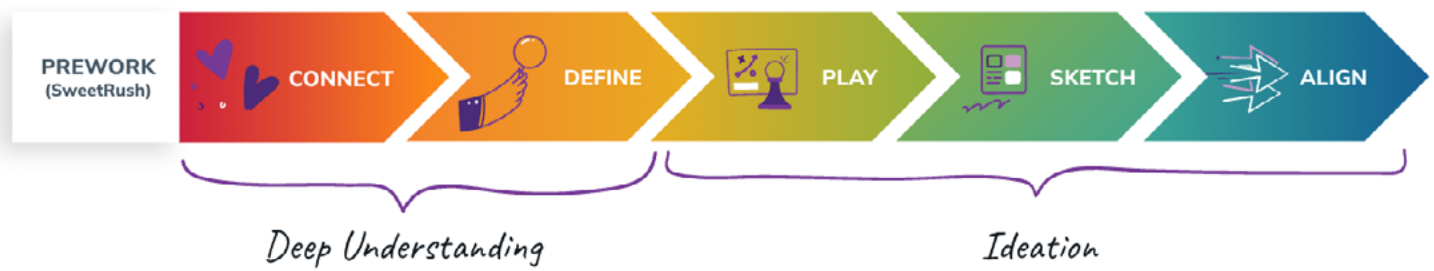

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Chapter 3:

CONSTRAINTS

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So far, we have spent our time looking at some pretty aspirational things when it comes to needs analysis. We explored the wants and needs of the stakeholders in chapter 1. And we revealed the wishes, desires, dreams, and preferences of the learner audience in chapter 2.

I have told you to gather data and information without bias or influence. I have told you to listen and not lead with your questions. And I have told you to document everything.

Now's the part, dear reader, where I have to tell you that you need to take everything you have heard and everything you have learned—all the goals and aspirations—and balance them with more practical things like constraints.

After all, you can dream up the most brilliant ideas, but if they're not realistic or feasible within the business needs and constraints, your solution will fail.

What are constraints?

Constraints can be defined as anything that sets limits or places boundaries on your learning solution. Constraints are usually discussed in terms of scope, time, and costs.

Scope

The goals, requirements, and tasks associated with your project

Time

The project schedule, milestones, and deadlines that need to be met along the way

Cost

The budget you have available for resources such as the people, tools, technology and equipment, materials, and even facilities you'll need to help bring your solution to life

You've already unearthed some of the constraints in your conversations with stakeholders and learners—perhaps without even realizing it. You know the **size and location** of your target audience. You know **how much time** they have available to learn. And you know what **tools and resources** they have at their disposal to learn.

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Each of these constraints, along with the others you'll gather during this stage of the needs analysis, will help guide and inform your solution design. And each constraint informs and impacts the other.

- **A change in scope**, such as adding new goals, requirements, or tasks, will impact time and cost.
- **A change in time**, such as bringing milestones forward, will impact scope and cost.
- **A change in cost**, such as budget cuts or alterations in the availability of resources, will impact scope and time.

When you understand and can anticipate what the constraints might be, you'll be in a stronger position to: maximize your resources and create solutions that meet the needs of both the stakeholders and the learners.

It's quite the balancing act, but you can absolutely pull it off if you know where to start! In this chapter, I'll give you a head start by sharing:

- How to identify whether you are working with a fixed set of constraints or are lucky enough to be able to influence them
- How to use the "D, D, I, and E" of the ADDIE model to identify and map out the constraints

I'll also take you into the world of reality television to share tips and examples of how others successfully manage to work with constraints.

As with everything we've looked at together so far—stakeholder analysis and learner audience analysis—you are still on a fact-finding mission at this point. Your goal right now is simply to identify the constraints. You will use this information, along with everything else you've gathered, later on when you prepare your needs analysis report (see chapter 4 for more on this).

Reality check

Depending on how you have been engaged to work on your learning solution, you'll be dealing with constraints in one of two ways. I like to call these the **Project Runway Scenario**[10] and the **Shark Tank Scenario**[11] because both scenarios are like being a contestant on one of these two reality shows.

Stay with me... I promise it will make sense!

10. https://www.bravotv.com/project-runway
11. https://abc.com/shows/shark-tank

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Scenario 1—**Make it work!**

Project Runway is a reality show in which budding fashion designers compete against each other to design and make items of clothing.

Each week, the designers are all given the same assignment: for example, to create a piece of womenswear that can be worn from the office to drinks after work. They are each given the same budget and number of hours to work their magic.

The designers are then given a brief period to sketch their ideas before being whisked away to the fabric store to buy whatever they need. Back in the workroom, they have access to their own tools (tape measures, chalk, scissors, etc.), the same sewing equipment (sewing machines, overlockers, irons, etc.), and a model.

And that's it. They have to work with what they've got in the time they have.

When the time is up, the designers showcase their work on the runway in front of a panel of judges. The judges ask the designers questions about the decisions they made before crowning a winner and sending another home.

How do you know if you're in a Project Runway scenario?

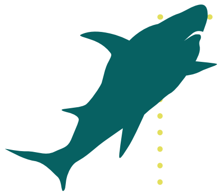
If you have been given a fixed budget and timeline to work with, buckle up! You're in a Project Runway scenario and you need to "Make it work!"

Scenario 2—**Convince me!**

Shark Tank has a different format entirely. The contestants on this show are all entrepreneurs who are not in competition with anyone but themselves. Their goal is to convince a panel of experts, aka the "Sharks" (who are themselves successful entrepreneurs), to invest in their businesses and get their start-ups off the ground.

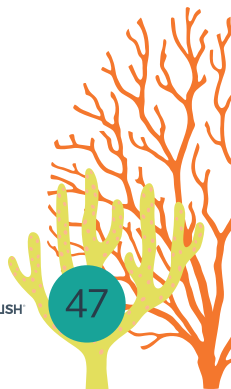
Entrepreneurs use their own time and money to research, design, and prototype their product or service. When they arrive on the show, they have just a few minutes to pitch their ideas to the Sharks.

The Sharks listen to the pitch—and then the grilling begins. The Sharks take turns picking apart the pitch by asking the entrepreneur a series of tough questions before deciding: (1) whether to invest in the business; (2) how much they are willing to invest; and (3) what percentage of the business equity they want for their investment. Throughout the grilling, the entrepreneurs need to be prepared to defend their ideas and, if offered investment, negotiate the terms of the agreement with the Sharks.



How do you know if you're in a Shark Tank scenario?

If you have been sought out for your expertise and need to present your findings and recommendations for ~~Shark~~ stakeholder approval—get your diving gear on! You're heading for the Shark Tank!



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How do you win at these games?

Knowing which game you're playing is half the battle—how you play the game is quite different.
So what does it take to be successful? Here are my tips for ruling the runway and swimming with the sharks!

Be a "Make it Work" winner

Pay attention to the assignment.
Listen carefully to the client's wants and needs and deliver on the desired outcomes.

Understand the constraints.
Look at the constraints you are working with and weigh what you need to get done (scope) with the time and budget you have available. Propose solutions you are confident can be completed in the time given. Finally, use your resources wisely. Splurge on the items or people that bring the most value, and see where you can be resourceful and thrifty elsewhere.

Know your limits and leverage your strengths.
Draw on your existing strengths and take calculated risks. Plan your time in a way that leaves wiggle room to tackle the more difficult tasks (or those that you are less familiar with) later on.

Be a "Convince Me" champion

Do your research.
Talk to your stakeholders and learner audience, and make sure you have both heard and fully understood their wants and needs. Stay up-to-date on best practices, and know what options are available for the development, implementation, and evaluation of your recommendations.

Understand the constraints.
Think through and plan out the logistics involved in putting your recommendations into action. From the design and development of the solution (and the tools and resources you'll need to get that done) to the implementation and evaluation. Make sure you have anticipated what and who it will take to put your recommendations into action on time and within budget.

Sell your recommendations.
Know who it is you need to sell your recommendations to and what they want and need to know from you. Tailor your pitch (aka the needs analysis report) to meet their needs. (More on this in chapter 4.)

Back up your recommendations with data.
Make sure you are able to back up and justify each and every recommendation you make with the data you have collected during your analysis. When you can do this, you'll be able to answer any questions that are thrown at you with confidence!

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What do the Make It Work winners and Convince Me champions have in common?

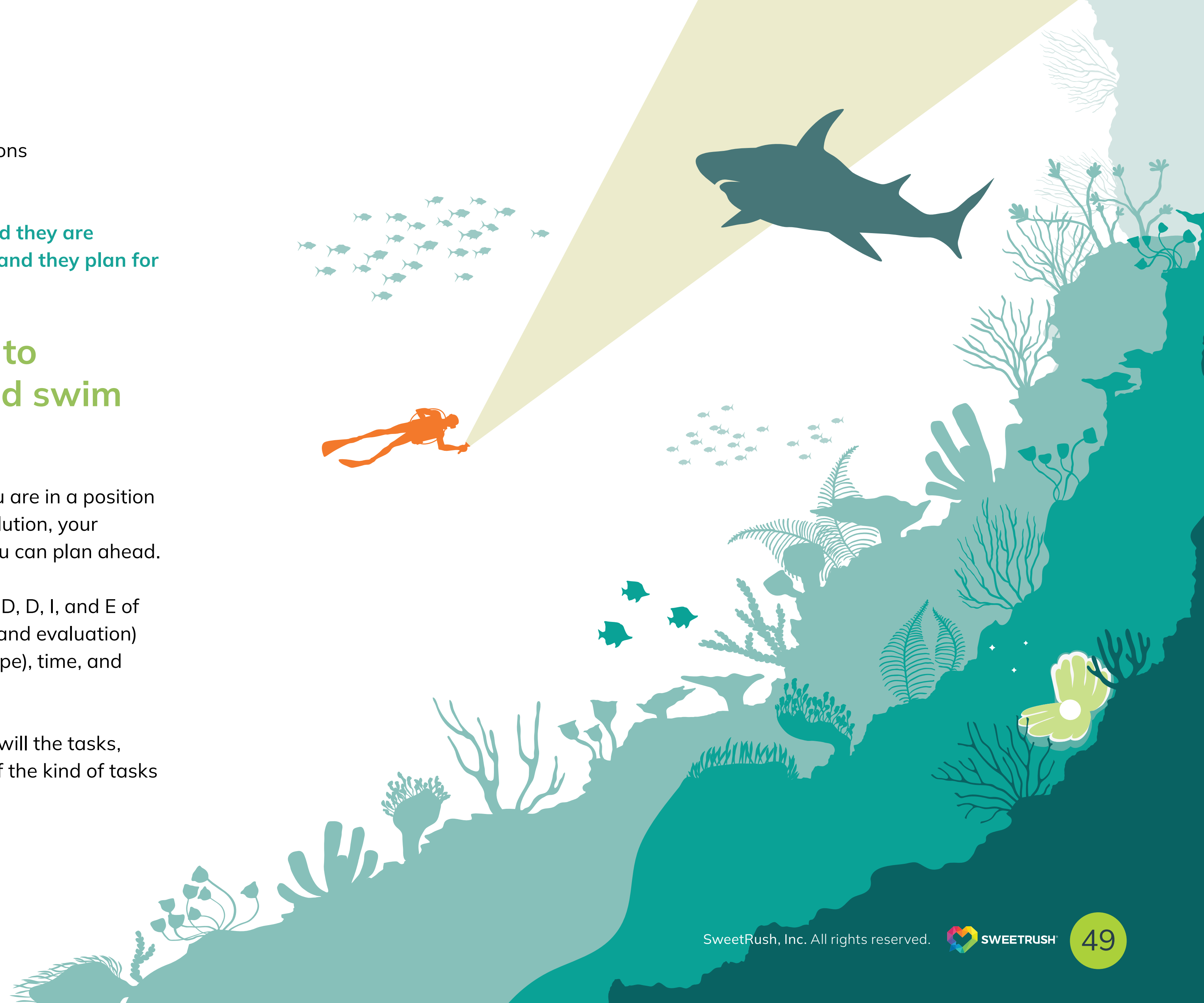
They understand the constraints they are working with, and they are strategic in their approach. They anticipate what's ahead, and they plan for what is possible.

So, how do you sashay your way to success and get your synchronized swim on with the Sharks?

Whether you are dealing with a fixed set of constraints or you are in a position to influence the scope, time, and cost of your next learning solution, your success lies in uncovering what the constraints are so that you can plan ahead.

I find it easiest to identify constraints by working through the D, D, I, and E of the ADDIE model (the design, development, implementation, and evaluation) one at a time. I look at each stage and map out the tasks (scope), time, and resources (cost) needed for each.

Needless to say, each and every project will be different—as will the tasks, resources, and time needed. To get you started, here's a list of the kind of tasks and resources I might capture during the design stage.



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Design stage constraints

Key questions and examples

Step 1.
Identify the tasks. (Scope)

- Define or validate the learning objectives.
- Perform a content analysis.
- Interview SMEs to explain content or fill gaps.
- Outline the evaluation methods for each level being used.
- Create templates (documents, presentations, eLearning, etc.).
- Build mocks or prototypes.
- Draft narratives and stories.
- Create avatars or character personas.
- Create high-level solution design.
- Conduct internal reviews and revisions (project team).
- Conduct external reviews and revisions (stakeholder).
- Obtain stakeholder sign-off.

Click here for more detail

Step 2.
How much time is needed? (Time)

- 15 days

Click here for more detail

Step 3.
What resources are needed? (Cost)

People
- 2 x Instructional designers
- 2 x Subject matter experts—content
- 1 x Evaluation expert
- 1 x Graphic designer
- 1 x Developer

Tools and Equipment
- None needed during design

Materials
- Content to review
- Stock images or illustrations—TBC

Facilities
- None needed during design

Click here for more detail

Continue reading

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Design stage constraints

Key questions and examples

Step 1.

Identify the tasks. (Scope)

- Define or validate the learning objectives.
- Perform a content analysis.
- Interview SMEs to explain content or fill gaps.
- Outline the evaluation methods for each level being used.
- Create templates (documents, presentations, eLearning, etc.).
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- Draft narratives and stories.
- Create avatars or character personas.
- Create high-level solution design.
- Conduct internal reviews and revisions (project team).
- Conduct external reviews and revisions (stakeholder).
- Obtain stakeholder sign-off.

Identify the tasks

List all the tasks that need to be completed by all teams during each stage. This will help you to estimate the time and resources you'll need.

Keep the tasks high-level. Think of them as the mini-milestones that need to be completed within a stage rather than the steps that need to be completed within a task.

Go back to the design stage

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Design stage constraints

Key questions and examples

Step 2.
How much time is needed? (Time)

- 15 days

Estimate the time

Regardless of which scenario you're working with, you'll have an implementation date that you are working toward. Working backward from that date, identify how long (days, weeks, months) it will take to complete each task.

If the timeline is looking tight, revisit the tasks to determine what needs to be prioritized, what can be scaled back or eliminated, and where you might need additional resources to get things done.

Go back to the design stage

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Design stage constraints

Key questions and examples

List the resources: What resources will you need at each stage?

People: Think about who you'll rely on to either carry out or support the tasks for each stage. This could include (but is not limited to): instructional designers (IDs); subject matter experts (SMEs); creatives (graphic designers, illustrators, developers); developers (coders, course builders, UI designers, UX experts); talent (actors, voice-over actors); vendors and other experts (change management, thought leaders, guest speakers); leadership (sponsors and champions); facilitators; and administrative support.

Tools, technology and equipment: Keep this list limited to anything you wouldn't usually have access to, or that you have limited access to in a standard course development. For example, if you always have access to an eLearning authoring tool, you wouldn't need to list it here. But if you have to share licenses for the authoring tool with others, it becomes a constraint.

Materials: As with tools and equipment, you only need to list any materials that you wouldn't ordinarily have access to. Materials include anything from textbooks, workbooks, and articles to stock photography, video, and illustration. They can also include any existing courseware or content that you need to review.

Facilities: List any facilities that you'll need. This applies to both in-house and off-site training.

Go back to the design stage

Step 3.
What resources are needed? (Cost)

People
- 2 x Instructional designers
- 2 x Subject matter experts—content
- 1 x Evaluation expert
- 1 x Graphic designer
- 1 x Developer

Tools and Equipment
- None needed during design

Materials
- Content to review
- Stock images or illustrations—TBC

Facilities
- None needed during design

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What does this analysis reveal?

Once you have all of your constraints identified, you can then think about the scenario you are in and what, if anything, you need to consider—or what, if anything, you can influence.

If you're working with a fixed budget and timeline, mapping out all of the tasks will help you to quickly identify whether what you are setting out to do is achievable. You'll be able to see what your big ticket items are and where you might need to scale back any efforts—also, what, if any, wiggle room you have to play with.

If you're in a position to be able to influence the scope, time, and cost of the project but need stakeholder approval, mapping out the constraints will help you facilitate that conversation. You can use your lists to justify your decisions and identify what, if anything, you're willing and able to let go during any negotiations that might follow.

For those of you in the Shark Tank Scenario, not to worry, there's much more help and support for preparing for those conversations in chapter 4. Read on to find out how to synthesize your findings and prepare and present recommendations that will pacify any Sharks in the tank.

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In a pinch? Here are my recommendations for quickly capturing your constraints.

If you don't have time to work through the constraints in the way I've shown, you can take a shortcut by looking at the project overall and mapping out the major activities and resources that you will need to take into consideration.

Map out the scope by asking:

- How big is the audience, where are they located, and how will they access the learning?
- What are the major tasks that need to be completed between now and implementation? What about the evaluation tasks?

Find out when things need to happen:

- When does the project need to be completed by?
- If you're running a pilot, when does that need to happen?
- If you are doing a train-the-trainer, when does that need to happen?

Identify who and what you will need to support the project:

- Who do I need to help design, develop, implement, and evaluate the program?
- What tools, technology, and equipment will I need to access, borrow, or buy?
- What materials will we need?
- Will we need to secure any facilities for the project?

Getting the answers to these questions will put you in a strong position. You will be able to anticipate what's ahead and plan for what is possible for your solution design.

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Chapter 4:

NEEDS ANALYSIS REPORT

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You've put in the time. You've asked the questions. Now it's time to step back, take a deep breath, and get ready for the final push to the finish line as you prepare your needs analysis report.

Why prepare a report?

It comes back to the importance of L&D—and you—becoming a trusted partner to your organization.

L&D is often first in the firing line when learning solutions fail. And solutions usually fail when we take an order-taker approach and give stakeholders what they want instead of *adopting a consultant's mindset and finding out what they need.*

- The needs analysis report solidifies your position as a consultant.
- It translates the work you've done as a learning professional into language that stakeholders understand.
- It turns wants and needs into problems and solutions.
- It shows what success looks like, what it will take to get there, what the risks are, and how you will measure it.
- And it can all be backed up by data and insights.

With your needs analysis report in hand, stakeholders will have no choice but to sit up and pay attention to what you have to say. It will open the door to rich and engaging dialogue. And it will take you one step closer to elevating the status of L&D from resource to trusted partner.

How do I position my report?

In chapter 3, we said that you are most likely to be in one of two scenarios when it comes to constraints: the **Project Runway scenario**[12] or the **Shark Tank scenario**[13]. Here's how to position your report, depending on which scenario you are in.

On the Runway?

Use the needs analysis report to show that you understand the business need and learner audience experience preferences, and that you can work within the constraints.

Can't make your solution fit fully within the constraints?
Highlight where the discrepancies are, and call out which parts of the solution are at risk. Then, present alternative options, explaining what you have sacrificed in each to make it work. This transparency will put you in a stronger position to begin discussions and negotiations, and will help you build that all-important credibility and trust with your stakeholders.

In the Shark Tank?

Use this report to show that you understand the business need and learner audience experience preferences, and that you are savvy about the constraints.

Make clear connections in your report between the findings and recommendations. Call out any assumptions that you are making about the constraints, and highlight any risks associated with the assumptions. When you can show the stakeholders that you are mindful and considerate of the constraints, you'll pave the way for open dialogue. This, in turn, will help build credibility and trust.

12. https://www.bravotv.com/project-runway
13. https://abc.com/shows/shark-tank

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In this chapter, I'll show you how to:

- Structure and organize your report.
- Clearly state the business need (aka the problem to be solved).
- Transform your raw data into clear findings and compelling recommendations.
- Obtain stakeholder buy-in and sign-off.
- Improve your report's readability.

And you'll get examples along the way: snippets of a sample needs analysis report

Structuring your report: take your readers on a journey

While the needs analysis report is a business document, it should also tell a story. Your report should persuade and help the stakeholders make the best decision for their organization and their learners.

Depending on who your readers are and what the culture of the company is like, you could get very creative here.
The goal is to make a connection with your readers so that they feel intrigued and compelled to read through to the end.

In a moment, I'll show you how to organize the report into sections.
But first, here's the story you'll want to tell along the way.

1. The setup
Gain their attention and set the scene by describing what the problem is, who it affects, and what will be at stake if the problem goes unaddressed.

2. The discovery
List the methods you used to investigate and solve the problem.

3. The insights
Share what you found out and what your findings actually mean.

4. The big reveal
Present your recommendations for solving the problem.

5. The reflection
Highlight some assumptions for the reader to ponder. You'll also point them to additional reading materials and data, in case they want to explore anything further.

6. The call to action
Engage the reader with your request for feedback and sign-off.

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To help tell your story, I recommend structuring your needs analysis report like this:

1. Executive summary (summarize the story)
2. Table of contents (provide navigation)
3. Description of the business need (set the scene)
4. Analysis methods (reveal your methods)
5. Findings (share what you found and what it means)
6. Recommendations (turn your findings into recommendations)
7. Assumptions (provide opportunities for reflection)
8. Sign-off page (leave a call to action)
9. Appendix (back up your findings and recommendations)

I will provide tips for what to include in each of these sections throughout this chapter. Since the executive summary and table of contents should be written last, I'll begin by showing you how to synthesize your analysis to present the business need. Then, I'll show you how to use the same approach to transform your data into findings and compelling recommendations.

Unless your stakeholder has specified otherwise, aim to keep the contents of each section of your report brief and concise. Leave the details for the appendix.

How to write: description of the business need

In chapter 1, I described the output of the stakeholder analysis as your North Star. Now is the time to go back over the discoveries you made and show the stakeholders what the North Star looks like. Show them how your findings provide the guidepost, not only for the rest of the analysis but also for the recommendations and the solution.

And it all begins with the business need.

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The business need describes the problem that you are trying to solve, who it affects, and why a solution is important to the business.

If you recall, during the stakeholder analysis, I gave you six questions to ask your stakeholders:

1. What is the training need? (What has driven this request?)
2. What are the desired outcomes? (What does success look like?)
3. Who is the target audience?
4. What should they (the target audience) be doing?
5. How will we measure success?
6. What might enable or derail the success of the solution?

The answers to the first five questions will give you everything you need to write the business need. The answer to question six will be incorporated— long with the learners' response to the same question—into the findings.

How to synthesize data and turn it into a compelling story

Before you can write your report, you need to synthesize your findings. Assess the information you have gathered, ask what these insights mean, and use the data to inform your recommendations—as well as the eventual solution.

As you are looking through your data, ask yourself:

What did I find out? And how will I explain it to my stakeholders in a way that makes sense to them?

What do the findings tell me? What does it mean for my solution recommendations? How can I make the connection for my stakeholders?

My golden rule: Keep the phrase, "if this, then that" in mind as you're synthesizing your findings. Tell yourself, "If this is what I have found, then that is what I must recommend."

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Here's how you can synthesize the answers to the first five questions of the stakeholder analysis.

Question
Begin by looking at the questions you asked.

Findings
Then ask, how will I use the findings to describe the business need?

Recommendations
Finally, think about what the findings mean and how they will inform your recommendations.

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● Question ● Findings ● Recommendations

1

What is the training need? (What has driven this request?)

- Explain what the problem is, specifically.
- Explain why it is important to the business—what impact is the problem having on the business right now?

Present your solution recommendation, and explain how it will solve the problem.

2

What are the desired outcomes? (What does success look like?)

Describe what success looks like: what are stakeholders expecting to see in terms of business performance once the solution is in place? (Think Level 4 results: increased sales, decreased errors, and so on.)

Describe how your recommendations will achieve the desired results.

3

Who is the target audience?

- Describe who this affects.
- Call out any opportunities for others to benefit from this training and any way their needs might differ.

Explain who the solution should be targeted toward and—where applicable—who else will benefit from it.

4

What should they (the target audience) be doing?

- Explain what the current performance expectations are and how they compare to what is currently happening.
- Call out the specific performance gaps, and specify whether they are relatively large or small.
- Explain whether the performance gaps are the same across the board or different within the target learner audience group.

- Describe what is needed to close the performance gap.
- Specify whether the solution will require a relatively large or small-scale intervention.
- Provide recommendations for handling different needs, where applicable.

5

How will we measure success?

Explain whether there is a need to measure the impact of the training and, if so, to what extent (Kirkpatrick Levels 1-4[14]).

- Recommend an appropriate evaluation strategy.
- Does the stakeholder not wish to measure the impact of the training? Include your recommendations anyway. Show that you are willing and able to measure the impact and add value.

14. https://www.kirkpatrickpartners.com/Our-Philosophy/The-Kirkpatrick-Model

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The findings prompts (●) will help you explain what the business need is, why it's important to the business, who it affects, and what success looks like.

You'll use the next set of prompts (●) to position or tee up your recommendations—specifically, how they address the business need, how the results will be measured, and who the eventual solution should be targeted toward.

Here's your first example snippet from our (fictional) report! Check out the labels ( ) to see how the content aligns with the stakeholder questions on the previous page. Note that the report doesn't follow the order of the stakeholder analysis questions, but it does address all of them. And remember, it's not a series of statements, it's a story.

Needs analysis sample report

Business need

The Product Design Group (PDG) at Cave Design Studio has identified a need to train Design Team Leads (DTL).

3. Target audience

The DTL is responsible for ensuring that the project team creates designs that align with clients' needs and specifications, that all internal procedures are followed, and that sound design thinking principles are applied.

The position of Design Team Lead is a project role and not a formal job title, meaning that Designers might work as individual contributors (Designers) on some projects and as DTLs on others.

Designers are usually invited to step into the DTL role after they have acquired sufficient project experience as a team member. The length of time it might take to acquire this experience is determined by the Manager of Product Design, who factors in the Designer's overall experience and expertise as well as their exposure to different types of project work.

There is currently no formal training program in place to transition Designers into the DTL role. Once identified as a candidate for the role, new DTLs are provided with on-the-job coaching and are paired with a mentor (an experienced DTL) until such point that they feel confident working without this support.

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Needs analysis sample report

Business need, continued

While the current model is somewhat successful, it lacks consistency. With no formal training in place, DTLs rely on their coaches and mentors to guide and instruct them. However, these "experts" each have their own leadership styles and ways of working—meaning new DTLs receive different instruction, feedback, and coaching, depending on who they are partnered with. In addition to creating confusion, this lack of consistency has an impact on the downstream team and their productivity, the product design itself, and the business results.

1. Business need

The Manager of Product Design shared a couple of examples to highlight this problem.

Decision-making: "Some Design Team Leads are unsure about which decisions they can and should make versus those that require manager approval. Leads who tend to err on the side of caution end up delegating most, if not all, of their decisions. This behavior creates bottlenecks and can lead to project delays, which, in turn, affect customer satisfaction ratings and, ultimately, profit margins.

1. Business need

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Needs analysis sample report

Business need, continued

Conversely, some DTLs make decisions without obtaining the appropriate manager approval—for example, decisions that relate to the use of tools and resources. "Failure to get approval for these decisions can lead to awkward conversations with our customers later in the process, which can impact customer satisfaction ratings. Profit margins also take a hit if we have to write off any mistakes made by our teams."

1. Business need

Feedback and coaching: "Team leads aren't providing consistent feedback and support to the Designers assigned to their projects. Some DTLs are great at giving detailed and constructive feedback; others will just call out what is wrong with a design without suggesting improvements. Some just make the changes themselves. This is not what we want. We want the Designers to be given consistent constructive feedback. The feedback should help Designers grow by calling out areas for improvement and also reinforce good performance by calling out what they are doing well."

4. What should they be doing?

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Needs analysis sample report

Business need, continue

The Product Design Group would like a training solution that creates consistency across the DTL role. The PDM has identified the following as criteria for success:

- DTLs know what is expected of them and have the knowledge, skills, tools, and support that are necessary to be successful.
- DTLS are consistently following the same processes, using the same templates and tools, and are providing the same levels of feedback, coaching, and support to Designers.
- There are fewer bottlenecks on projects.
- There are fewer errors on projects.
- There is an improvement in customer satisfaction ratings for categories that relate to product design and the product design experience.
- Profit margins increase—as a result of fewer project delays and resource and expenditure errors.

2. Desired outcomes

5. Evaluation strategy

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How to write: findings and recommendations

You can use the same technique I've described for stating the business need, to synthesize the rest of your analysis and write your Findings and Recommendations sections..

My golden rule: I like to write the findings and recommendations for each piece of analysis in tandem so that I can make clear correlations between them. You can then cut and paste the content into the relevant sections of your report afterward.

In the example on the right, I have made notes about how to address one of the barriers—the lack of a job description and competency model. I began by writing down the finding, then I wrote the "what does this mean?" And finally, I wrote the recommendation.

Writing it out like this helps me think through the "if this, then that" technique. Once I'm done, I can simply cut and paste the pieces I need into the relevant sections of my report.

Needs analysis sample report

Synthesizing your findings

Barriers (External)—No job description and competency model

Finding: During the stakeholder analysis, we learned that there is no formal job description or competency framework currently in place for DTLs. (These documents do exist for the Designer role.)

Move this to the findings section of your report.

What does this mean? Without formal standards and guidelines, it is not possible to ensure or evaluate consistent performance in the role.

Recommendation: We recommend creating a job description and competency framework for the DTL role. Once created and validated, these documents can then be used to (a) create a formal DTL training curriculum, (b) create a tool to assess the knowledge and performance of incumbent DTLs and identify any gaps, and (c) create a coaching/feedback tool to evaluate ongoing performance in the role.

Move this to the recommendations section of your report

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Findings and recommendations: how to use your audience analysis research

If you recall, the audience analysis helps you to uncover what the learners already know, how easy it is for them to learn at work, and how they like to learn. This piece of the report is all about building empathy for the learner and presenting what their ideal learning experience looks like to the stakeholder.

I like to include direct quotes from learners in this section of the report. Get permission from the learners first, or ask if you can quote them anonymously. Sharing the learners' wishes in their own words will build empathy for the learners and add impact to your report.

In the example shown on the right, the learner quote adds weight to the recommendation.

See the appendix for prompts to help you work through the audience analysis findings.

Needs analysis sample report

Synthesizing your findings

Audience insights

Some learners shared that they prefer to learn by watching videos or listening to podcasts.

Finding

I find that I easily get distracted when I'm reading a lot of text or slides, whereas I hardly ever lose focus when I'm listening to a podcast. If anything, I pay more attention because I'm worried I might miss something. I also like the fact that I can quickly and easily pause and replay bits of it if I need to clarify what I heard.
—Target Learner

We recommend including multimedia assets in the learning solution. This will provide different types of learners the opportunity to experience learning that suits them best.

Recommendations

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Findings and recommendations: how to use your constraints research

For this section, present the findings and recommendations in a calm, professional, and rational way. Why do I need to point this out? If you're anything like me, you want to do things right, and it can be difficult when constraints get in the way. Budget, time, and scope have all laid waste to many of my best ideas. **Keep any personal feelings and emotions you have out of the report.** Instead, use your voice to assert your professional opinion and influence others to make the best decisions—which may or may not include adjusting the constraints if you are able to present a compelling case.

How will you do this?

Present your ideal-world, constraint-free recommendation first. Explain why it is the right solution, and back it up with the data and findings from the report. Then, point out the constraints you are working with, and describe *how you will work around them*. This is very important. Show what can be done with what you have, then call out what you have to let go of. Finally, call out any risks associated with letting go of whatever it was.

This is the time to use language like "it is my professional opinion that..." or "in order to ensure success, it is a best practice to…." Bring forward your professional opinion, and leave your emotions at the door.

When stakeholders are able to see what good looks like and how it compares with what you can do, they'll either be grateful that you have been able to come up with a workable solution or they might even consider adjusting the constraints. Either way, they'll be glad to have the full picture so that they can make an informed decision.

In the next example, I am leveraging my findings to acknowledge the business need and position my recommendation—to widen the scope of the learning solution.

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Needs analysis sample report

Synthesizing your findings

Finding

While it's clear that the DTLs will benefit from training on topics like decision-making, coaching, and giving feedback, we believe that there are larger issues that need to be addressed first. Namely, role clarity and definition. We heard on more than one occasion from both stakeholders and target learners alike that there is confusion around the DTL's role and responsibilities.

> *My mentor told me that I should feel empowered to stop the Designers if they are not applying the feedback that I have given them. This conflicts with what the Project Manager told me. She explained that I should route all of those decisions through her. It's hard to know who to listen to. The rules seem to change on each project and with each team member.*
> —Target Learner

Recommendations

It's our professional opinion, therefore, that while training is needed, it should form a part of a bigger solution. We recommend widening the scope of this solution to include the development of a job description and competency model. We strongly recommend that this work is carried out as a priority.

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See the appendix for some examples and prompts to help you work through the constraints.

I have one final piece of advice before we leave this section of the report. This is not the place to embellish or in any way overstate your case. Don't make recommendations that aren't based on findings. And don't offer solutions that won't solve the problem. Expect that any and all aspects of your report will be challenged by stakeholders, and be prepared to back everything up with data.

How to write: the rest!

With the big task of synthesis out of the way, here's how to tackle the rest of your report.

Executive summary: This section is read first but should be written after you have completed the rest of your report. It should compel your reader—the stakeholder—to read the rest of the report.

The executive summary should be kept short—no more than one page—and should include the following information:

- The purpose of the report
- The method of your analysis
- Key findings
- Key recommendations

Table of contents (TOC): The TOC provides an at-a-glance view of the report's structure and shows where to find the contents.

My golden rule: This is also the place in the report where I like to add any references such as glossaries, keys, or legends—anything the reader needs to decipher what's contained within the report.

Analysis methods: Describe what you did to gather your data and insights. Explain the approaches you used (questionnaires, interviews, and so on), the reason you took this approach, and the way you identified the representative sample audience for the learner-audience analysis.

Assumptions: List anything here that is dependent on data that you weren't able to capture, or that can't be backed up by your analysis.

Examples:

- *Adherence to the timeline assumes that all resources are available to begin on <date>.*
- *Success of the solution is reliant on leadership sponsorship and role modeling.*

Be sure to specify anything that requires a decision by the stakeholders before the solution can be put into place.

Sign-off page: This is probably the most important detail to add to your report: please make room for a signature from the main project stakeholder or sponsor. Why? Because if the stakeholder(s) know they have to sign off on what's inside, you can be sure that they will read it and pay attention to the details.

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I recommend formalizing this process by:

- Scheduling and communicating review periods, and sticking to them—gently follow up if review windows are missed.
- Being clear on what feedback you are looking for—do you want the reviewers to review ideas and prepare to discuss them at a formal meeting? Should they provide their thoughts on alternative approaches?
- Providing instructions on how to give feedback—do you want your feedback via comments, or should reviewers make their changes directly into the document? Should they use Markup mode?

If revisions are needed, make sure you use version control to keep track of earlier iterations. And, once you have that all-important sign-off, be sure to send a copy of the final version to all involved parties.

Appendix: This is where you can share all of the data that supports your findings. This might include but is not limited to things like: existing training program Level 1 evaluations, stakeholder and learner audience questionnaire and survey responses (if using), and interview transcripts.

Be mindful of people's wishes to remain anonymous—scrub any details such as names, roles, locations, and so on—or anything else that could give away the participants' identity.

And there you have it: the culmination of all your hard work, dedication, and effort, documented for prosperity—and hopefully approval—in one place!

In other chapters, I have shared tips for scaling back your efforts. The needs analysis report is something that will naturally increase or decrease in scale, depending on with the size and complexity of your project. But you should aim to include all of the sections that I have recommended.

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How to use formatting and graphic design elements to improve readability and impress your readers

Here are some tips for formatting and introducing graphic design elements to bring your content to life:

1. Use clear and logical headings and subheadings to group your content together.

2. Keep the language simple. Avoid using unnecessary jargon.

3. Keep your paragraphs short and concise.

4. Number all your pages, and keep the table of contents up-to-date as you revise and make edits.

5. Add hyperlinks to help readers navigate and jump to different parts of the report.

6. Add charts, graphs, and infographics to break down complex information. (Be sure to clearly label charts and graphs.)

7. Add images and illustrations to help tell your story—you could even introduce themes and metaphors like the ones used in this book

8. Don't have graphic design support? You can use simple devices like color or iconography to call out or represent different aspects of your content.

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CONGRATULATIONS!

You made it! You are on your way to becoming a trusted partner.

I hope you'll agree that the process of doing a needs analysis is not as overwhelming as you might have first thought—when you sift out the whys and wherefores.

Write: emma.klosson@sweetrush.com

Connect: linkedin.com/in/emmaklosson

Read: www.sweetrush.com

It's about stepping out of the order-taker role and into a consultant's shoes. It's about asking lots and lots—and lots—of questions. It's about engaging the stakeholders and the learners—and getting aligned on what they need and expect. It's about working with constraints. And it's about taking all of that information and asking: "So what? What does this tell me about the solution that is needed? And what can I do to make sure that I am adding value?"

And I have every faith that you can do it!

So, whether your next training project is large or small, high-risk or low-risk, for 10 people or 10,000...Do your needs analysis. It will save you time. It will increase your chances of success. And it will position L&D as a trusted partner to the organization.

Please reach out anytime if I—or the SweetRush team—can help you on your path to creating learning solutions that add value. I'd love to hear any feedback you have on this eBook or your desire to learn about other topics that are of interest to you. And if we can be of service in partnering with you and your organization, don't hesitate to reach out. It would make my day—our day—to hear from you.

Wishing you all the best on your journey!

Emma Klosson

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Testimonials

Consultants from SweetRush are professional and embody a collaborative spirit to help you reach your goals. Their team is extremely talented and, as such, can address many tasks in a short amount of time, without sacrificing quality. They stay current in terms of what the latest developments are in the industry. And it's very clear that, while they value the customer relationship, they are also not afraid to say no when appropriate, which speaks to their integrity as a vendor.

Senior L&D Manager, Insurance

Amazing how SweetRush can quickly understand our business. Right from the start, the SR team (yes, I said team) worked with us to develop an exciting virtual reality experience. Their ability to wrench on the creativity nerve was amazing. SR's customer-centric approach is second to none, while their flexibility and innovation exceeds expectations. The result is a handsomely designed, impactful virtual reality solution. More projects to come.

HR Manager, Transportation/Trucking/ Railroad industries

From the start, SweetRush understood our business drivers and goal. Instead of a traditional sales or account manager, we were partnered with an instructional designer, and this made the process seamless. Working with their team of experts was an absolute pleasure—they got us and what we were trying to achieve and knocked it out of the park. The result was a beautifully designed, elegant and fun solution. Exactly what we had hoped for.

L&D Manager, Computer software industry

When we look to bring on new learning partners, one of the criteria that we look at is the corporate culture of the organization and whether or not we believe it would be a true partnership. SweetRush comes out on top in this area. Working with them always feels highly collaborative, and the team builds off of one another's ideas to get the best possible result for the client. When we work together, it is like we are all one team versus two separate entities.

Senior HR Manager, Consumer Goods

SweetRush approaches each solution as a partner. During the initial brainstorming, they help identify the end objectives and provide alternatives that can be developed within a given budget. I appreciate collaborating on solutions, the thoroughness of the work, and the professionalism of each of the teams that we have interactions with, from design to billing for services.

L&D Director, Health Care

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GOOD THINGS

Nonprofits, we stand in awe of what you do. Let us show you how learning and communications can amplify your impact.

APPENDIX

1. How to talk to stakeholders about evaluation.

2. How to use questionnaires and surveys to capture learner audience data and insights.

3. How to synthesize your learner audience analysis findings.

4. How to synthesize your constraints findings.

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From Chapter 1: Stakeholder Analysis > Question 5: How will we measure success?
Use this table to talk through the evaluation options with stakeholders.

Go back to chapter 1

Level	Evaluation Options (Methodology)	Benefits	Effort	Risk of Not Doing This
(L1) Reaction Level How do learners rate the learning experience?	• Surveys or polls • Interviews • Ratings In all instances, the questions are usually written by an instructional designer.	These methods tell you where to tweak and adjust the learning experience based on the following: • What the learner liked and disliked • Whether they found the experience useful, meaningful, relevant, and engaging	In general, L1 evaluations are relatively easy to devise, implement, and analyze. As you would with any evaluation strategy, think about the size of your audience, and scale the implementation and analysis approach accordingly. How you handle responses from a dozen people will be different from how you handle responses from a thousand. For larger audiences, you may need to consider automating the process.	Without learner feedback, you cannot gauge how meaningful, relevant, and engaging the experience was. This feedback is critical. Learners who aren't engaged or who don't find the experience relevant or meaningful are less likely to learn. When learners don't learn, they won't change their behaviors. And when they don't change their behaviors, you won't get the results you're hoping to see.
(L2) Learning Level What did they learn?	• Knowledge checks • Pre- and post-training assessments • Pop quizzes • Scored and unscored tests • Examinations • Simulations • Observation	These methods tell you whether the learner has acquired new knowledge or skills. Pre- and post-tests in particular will help isolate the impact of the training.	A basic rule of thumb: you should have at least one knowledge check for each learning objective. The effort involved will depend on how robust your evaluation needs to be. Pop quizzes and other activities that simply check for understanding are usually quick and easy to put together. The more complex your assessment and the higher the stakes (think certification level), the higher the effort.	If you don't check for understanding, it's not possible to ascertain the efficacy of the training. Did learners acquire the new knowledge and skills? Were the learning objectives met? Since knowledge is tied to performance, it's important to measure this.
(L3) Behavior Level How are they applying what they learned?	• Observation • Performance metrics	Both methods show you whether and to what degree the learner is applying new skills and behaviors in the workplace.	L3 evaluations are needed when you want to observe a shift in behavior or see whether the audience members are applying what they learned. The effort for this level of evaluation will also depend on the following: • The size of your audience • Your ability to observe learners in the workplace • Availability of performance data	If your training initiative is focused on changing existing behaviors or adopting new ones, measuring the efficacy of the learning is crucial.
(L4) Results What is the impact on the business?	• Key performance indicators • Control groups	Both methods measure the impact the training has had on the business.	If the company is already tracking key performance indicators or other performance metrics, the effort here is minimal—you continue to use those metrics and see if they change. The tricky part is isolating the impact of the training. One way to do this is to set up control groups. The effort required depends on the size of your audience and the nature of the work it performs—but a control group will validate your data.	L4 measures the overall success of the learning program. If you can prove that training had a measurable impact on the business, you can validate the value of L&D's contribution and will be seen as a trusted partner.

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From Chapter 2: Learner Audience Analysis > **Step 2: Set up face-to-face....**

Go back to chapter 2

Using questionnaires and surveys to capture learner audience data and insights.

While nothing beats meeting with your learner audience face-to-face, there will be instances that will require an alternative approach. Namely, the need to gather data and insights from a large, geographically, dispersed population

In this instance, I would still urge you to try to speak to a small representative sample of some of the people and then supplement this approach by capturing the rest of the input using surveys and questionnaires. If you do opt for the survey/questionnaire approach, here's what you need to keep in mind:

- **Use different question types and approaches to gather your input.** While a yes/no, or likert scale, or multiple choice format might be useful when trying to find out what a learner knows (step 4), you won't gain any insights into how a learner likes to learn (step 5) by offering them a set of predetermined choices. Send out a survey to find out what people already know and prepare a questionnaire—with carefully worded open-ended questions (more on this later)—to find out how they like to learn.

- **Think about how you will distribute the tool and capture results.** Will the tool be accessible to everyone you are trying to reach? If you are creating a digital survey or questionnaire, make sure it is easily accessible, downloadable and fillable by your representative learner audience. Consider the needs of people who don't have company email addresses or access to the learning management system (LMS): how will you obtain their data and hear their voice?

- **Give people time to respond and set a deadline.** Be clear on the expectations for completing and returning the questionnaire. Send out follow-ups and reminders where necessary. Give yourself enough time to process the data after the deadline.

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- **Expect that a lot of people won't respond.** According to a 2019 benchmarking study run by SurveyAnyplace, the average *online* survey response rate is 29%[15]. Be prepared for a low response rate and factor this in when sending out surveys and questionnaires. What's the minimum number of responses you're prepared to work with? Do you need to widen the number of surveys and questionnaires you send out?

- **Get stakeholder and manager buy in and support.** If your learner audience sees that this effort is backed by leadership, they are more likely to respond to your requests. Get the stakeholders and managers involved in the process. Ideally, have them send out the survey on your behalf. If you can't do that, ask them to write a few words that you can include when distributing the survey. You need to show your learner audience that this request comes with the support and backing of leadership.

- **How will you collate and consolidate data?** Think about how you will collect and collate your date and/or insights when preparing your questionnaire. Do you want to be able to run a report that graphs your results? How will you go through and consolidate answers to the open-ended questions? Thinking about how you will handle and use the data will help you to prepare better—and by that, I mean more useful—questions.

- **Will you make the survey anonymous or require named responses?** There are pros and cons to both approaches here. When people know they can complete something anonymously, they are more likely to offer a candid response, which is what you want. The flip side to this is the inability to follow-up with people and probe further into specific responses. There is some middle ground here: you could ask for people's names, assure them that all responses will be handled with confidentiality, and explain that names will only be used to reach out for further clarification. There's a risk that people won't be as candid so you'll need to make the decision based on the problem you are trying to solve—and how insightful you need the responses to be.

If this feels like a lot of effort, I'm afraid it kind of is. But it will be necessary to think about all of these things if you want reliable data and you choose to go down the questionnaire route.

My advice—as if you need to ask—is this: save yourself the administration time and set up some video conferences instead! If you absolutely can't do that then make sure your surveys and questionnaires are set up for success.

15. https://surveyanyplace.com/average-survey-response-rate/

From Chapter 4: Needs Analysis Report > **Findings and Recommendations: How to Use your Audience Analysis Research**
Use this table to synthesize the learner audience analysis findings.

Go back to chapter 4

Learner Audience Analysis

<table>
<tr><th>Question</th><th>Findings</th><th>Recommendations</th></tr>
<tr><td>What do they already know? What can they already do?</td><td>Describe the learners' current knowledge and performance levels.

Describe what, if any, training the learners have already had and how it might differ from person to person.

Describe what, if any performance support the learners rely on to do their job and how it might differ from person to person.

Describe what might be contributing to the performance gaps.</td><td>Describe whether training already exists, what is currently working, and what you might be able to leverage.

Explain whether the learning will need to be the same or different for the learners.

Explain whether additional performance support might be needed.</td></tr>
<tr><td>What is their work life like?</td><td>Describe the learners' work environment and what, if any, limitations it creates on where, when, and how they are able to consume learning.</td><td rowspan="2">Combine the recommendations to include the best options for the learner in terms of practical aspects, such as the preferred modality, accessibility, length, and duration of the learning. Also, address the emotional aspects, such as what motivates them, when and where they like (or are able) to learn, and the types of tools and technology they like to use and have available
to them.</td></tr>
<tr><td>How do they like to learn?</td><td>Describe, using as many of the learners own words as you can, how learners like to learn.

Refer to any preferences around modality, duration of training, level of complexity, or intrinsic and extrinsic motivators.</td></tr>
<tr><td>What might enable or derail the success of the solution?</td><td>Describe what, if anything, might be a barrier to current performance (internal and external).

Describe what, if anything, might be enabling current performance (internal and external).

Highlight any factors (internal or external) that training alone cannot impact. (Think access to tools or equipment and technology—or environmental conditions and lack of leadership support.)</td><td>Explain whether training—or training alone—will solve the problem.

Where barriers exist that can't be addressed by training alone, describe what else will be necessary to ensure the success of the solution. (Think change management support, access to tools or equipment, updated policies and procedures, leadership, or other sponsor-level support.)</td></tr>
<tr><td>What might enable or derail the success of the solution?</td><td colspan="2">This is the same question you asked during the stakeholder analysis. You can combine your learner findings there or add them here.</td></tr>
</table>

From Chapter 4: Needs Analysis Report > **Findings and Recommendations: How to Use your Constraints Research**
Use this table to help you synthesize your findings about the project's constraints.

Go back to chapter 4

Constraints

<table>
<tr><th>Question</th><th>Findings</th><th>Recommendations</th></tr>
<tr><td>What constraints are there for scope?</td><td>Describe any limitations as it relates to the project scope. (Think overall project goals, requirements, and tasks.)</td><td>Explain what, if anything, you will have to forgo or scale back on. For example, what tasks or steps might you have to skip? What resources might you have to leave out?</td></tr>
<tr><td>What constraints are there for time?</td><td>Describe any limitations as it relates to the project timeline.</td><td rowspan="2">Describe your alternate solution or work-around.

Explain where the risks are—include risks to the desired outcomes and risks with running the project itself.

Explain what this might mean for the quality of the solution and the learner experience.</td></tr>
<tr><td>What constraints are there for cost?</td><td>Describe any limitations as it relates to the project's budget.</td></tr>
</table>

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Bonus Chapter

The Design Thinking Revolution

How an Integrated Design Process Can Create Learner-Centric Virtual Training

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NYSPCC THE NEW YORK SOCIETY FOR THE PREVENTION OF CRUELTY TO CHILDREN + SWEETRUSH

I think of the young girl that I was, and the little girls and young women all of these survivors were, every day. I feel like I see them in the faces of my two precious daughters. When I watch my daughters' eyes light up as they dance to The Nutcracker, I remember the little girl that I and all of these women used to be. The sparkle their eyes must have had as mine did before their innocence was taken. I watched my daughters love and trust unreservedly, and I remember the long road that it has been to let myself love and be loved without fear. I think of the scars that still remain for all of us.

—**RACHEL DENHOLLANDER**
FROM HER VICTIM STATEMENT, READ AT THE SENTENCING OF LARRY NASSAR[8]

The case and trial of Larry Nassar, the former USA Gymnastics national team doctor accused of assaulting at least 250 young women and girls, shocked each and every one of us. One hundred fifty-six women confronted Nassar during his sentencing, describing the horrific pain and suffering his actions caused. And while that case made world headlines, the problem is larger than Nassar.

Established in 1875 as the first child protection agency in the world, the New York Society for the Prevention of Cruelty to Children (The NYSPCC) is on a mission to make all children safe from abuse and neglect. The NYPSCC, in partnership with the Athlete Assistance Fund (AAF), is now helping to educate children in youth gymnastics on how to recognize and speak up about sexual abuse and grooming.

This work is right in the agency's wheelhouse. To respond to the complex needs of abused and neglected children—and those involved in their care—The NYSPCC provides counseling, legal, and educational services. Over the past 144 years, the agency has served more than two million children.

In fact, The NYSPCC already had a sexual abuse prevention program that they brought to K-12 classrooms all over New York State. **With an incredible team of subject matter experts and educators, and vast experience in the topic area, they were ready to make a difference in youth gymnastics, starting with a pilot in New York.**

What they needed was a partner to help bring this education to life as virtual training. When SweetRush got the call, you'd better believe we were ready and eager to join The NYSPCC on this mission.

8. https://edition.cnn.com/2018/01/24/us/rachael-denhollander-full-statement/index.html

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Enter SweetRush CoDesign Workshop

Design Thinking for Learning and Development

We were bringing together two areas of expertise: The NYSPCC's deep expertise in providing children with what they need to prevent and report abuse, and the SweetRush expertise in creating award-winning digital learning. Working collaboratively from day one was essential. **Together, The NYSPCC and SweetRush team needed to question and validate assumptions.** And user testing would be a vital part of the process, to ensure the proposed solutions worked for the target audiences—three different age groups: grades K–3, 4–6, and 7–12.

Design thinking offers a methodology to do all that and more. And SweetRush has adapted the process to be specifically applicable to the design of learning and development solutions—we call it CoDesign Workshop.

Plans were made to get together in New York and spend an intense several days designing the program, and then COVID-19 hit. The entire process needed to pivot—now the collaboration needed to be done virtually.

As an entirely virtual company for 10 years, SweetRush was ready to make the pivot to virtual CoDesign Workshop.

Read about how we made this happen.

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Who's Invited to CoDesign Workshop?

The design thinking experience is most successful when all parties are at the table to participate in all five steps. This embraces the input of all: L&D and/or HR professionals, stakeholders, SMEs, the vendor-partner team, and—importantly—target learners. We try to get a representative cross section of learners; learning programs often have broad audiences with various, complex demographics.

SweetRush's CoDesign Workshop experience is led by a master facilitator. The project team leads are all in attendance—Solution Architect, Project Manager, Creative Director, Lead Instructional Designer, and possibly a Lead Engineer, depending on the nature of the project. As you'll see, in virtual CoDesign Workshop, this team plays an important role in the Sketch phase by collaborating on a prototype.

With CoDesign Workshop, we have all the right parties in the virtual "room" to create the best possible learning solution design. Check out The Benefits of CoDesign to learn more.

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The Benefits of CoDesign Workshop

- **Solutions with CoDesign Workshop are stronger.**
  We gain a deep understanding of the constraints and requirements, so our solutions are aligned with learner and business needs. One ID shared: "When we helped the client think through their audience needs, it became clear that they needed something beyond eLearning to solve their problem. In the end, we might only produce the eLearning, but they understand the support pieces they need to implement for true success."
- **Teams with CoDesign Workshop are stronger.**
  The immersive, intensive, collaborative experience deeply bonds the team. One Solution Architect shared: "I've seen a significant reduction in escalations in projects that begin with CoDesign Workshop. I've seen past struggles to align stakeholders and the project team, and to adapt the solution as more information becomes available. The CoDesign Workshop experience mitigates those risks!"
- **Projects that begin with CoDesign Workshop are faster.**
  On average, CoDesign reduces project duration by 34 business days! One ID shared: "It takes considerably less time to develop a Solution Blueprint after CoDesign Workshop, and I am much more confident in the work."
- **Solutions are learner-centric.**
  In CoDesign Workshop, learners are front-and-center during the process. We are frequently surprised that their needs and experiences vary dramatically from what the stakeholders had imagined. For example, we had a stakeholder suggest that the learners, recent college graduates, desired a technology-rich learning solution with VR and apps. When interviewed, learners pleaded with us for a low-tech, slower-paced solution; the volume of information they were required to absorb was overwhelming. Together we created a solution with a lighter cognitive load.

90% of our clients say they'd **recommend CoDesign Workshop** to others.

And, seeing the positive outcomes for our clients, SweetRush has embraced **CoDesign Workshop for solving our own internal challenges as well**.

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Let's explore the **five steps of SweetRush's CoDesign Workshop process** and how each was applied to this challenge.

The five steps of CoDesign Workshop **(Connect, Define, Play, Sketch, and Align)** are designed to first gain a deep understanding of the audience, and then facilitate collaboration and ideation of great ideas. Our solution is validated and tested, and the end result is a Solution Blueprint detailing the path forward.

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Connect

Building Empathy with Learners

With design thinking, the outcome we're looking for is to design learner-centric training that gets that audience excited about learning. Empathy is key—we need to deeply understand our learners in order to design effective learning solutions for them.

Typically in CoDesign Workshop, we will ask our client to invite learners to participate in the entire CoDesign Workshop process—during the first step, they will open up about themselves and we will explore how they like to learn. But given the subject matter and age groups involved, that wasn't possible. It was a real challenge to overcome.

The team came together with their areas of expertise. The NYSPCC team brought their deep expertise from teaching in the classroom, and SweetRush brought research and expertise in digital learning and entertainment preferences and behaviors for the different age groups.

Three Age Groups

K-3 4-6 7-12

Together, the team validated assumptions and made sure they were speaking at the right level for each set of kids. This work yielded lots of insights that positively impacted the course design.

> ***From my experience with publishing and writing for children, I knew that kids ages 8-12 are known to be completionists. If you look at book series for that age group, you'll often see a checklist in the back to collect all the books. There's no linear progression to the books, in terms of the story; the publisher knows kids like to collect all of the books. We talked about these kinds of preferences and how to bring them into the solution design.***
>
> **—Rafi Mittlefehldt, SweetRush Instructional Designer**

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A disturbing statistic that The NYSPCC team shared is that one in five kids will have experienced some kind of sexual exploitation or abuse situation by the time they are 18. Tough to process, but important for learner empathy: those same kids will be part of the audience taking this educational program.

We realized it was very important that we not put the learner in the story. Normally, we might consider having the action happen from a firsthand perspective, but in this case, we're going to have potentially sensitive scenarios, so the learner needs to be apart from it. Instead, they'll be watching and taking action in other ways.

—Rafi Mittlefehldt, SweetRush Instructional Designer

So that younger kids stay engaged, they get to create their own avatar within the course. But they are well outside the story when they are completing different activities, and not in the scenario itself.

Empathy-building and research also influenced the language used in the program.

Rather than have the learner "earn" anything, we talk about how they are "unleashing powers" they already have within themselves. They don't "earn" the ability to speak up about sexual abuse; they unleash a power that was always within them. It's just a small language tweak, but this level of attention to detail is important for these types of projects.

—SweetRush Solution Architect

Empathy-Building Design Thinking Activities

The Connect phase of CoDesign Workshop is always full of interesting insights and revelations. Here are some activities that can bring out the details you need to know:

- **Talk show interviews:**
  Invite three or four learners "on stage" to be interviewed by an experienced Facilitator or Lead Instructional Designer. Ask open-ended questions. To be a real empath, ask your first question and just wait—no follow-up or comment. Just wait, and your learner may give you a subtler, more nuanced response.
- **Love letters and break-up letters:**
  If you're approaching a redesign, ask learners who have been through the program to write love letters and break-up letters about it. It's a creative exercise that will unearth what to keep and what to change.
- **Empathy walk-throughs:**
  Have learners record and talk through an experience that relates to what you want to teach them. This could be how they use a piece of software or the steps they go through during a customer interaction. Give them flexibility with how they share—their creativity, humor, and passion will help you connect with them more deeply.

If you're up for some lighthearted but insightful fun, check out this "Dear Diary" account of a game-loving call center associate who participates in CoDesign Workshop.

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Define

Identifying Constraints and Anticipating Roadblocks

Continuing to build deep understanding, during the Define stage, the team dug into two key activities: **Build the Box** and **Kill the Program**.

Build the Box

In this activity, the team defines the boundaries—the "must-haves"—of the program. The exercise illuminates all of the perceived constraints, and asks stakeholders to think about and consider each one generated by the large group and decide which are truly must-haves vs. nice-to-haves.

Some of the key findings from Build the Box that ultimately influenced the design included:

- **The need for scalability.** The initial need and program focuses on New York State and youth gymnastics, but the hope is that the program will extend beyond New York to a national program, and even extend beyond gymnastics. With this understanding, later in the process, the team began to create a story with layers that can be peeled away or changed for different audiences.
- **Reality of experience with abuse for some learners.** As mentioned, some learners may have already experienced abuse. Additionally, the majority of learners will engage with the program in the home, and the abuser could be in the home. These were important considerations for the storyline and the learner's role in the program.
- **Technical requirements for an external audience.** Rather than a corporate or organizational audience with a limited set of approved devices, this audience will have a wider variety of devices and platforms. This impacts screen size and QA needs. During this step, the team also defined the authoring tool and LMS needs and specifications.

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Kill the Program

This activity asks participants:

Let's say you had an ideal program design. What environmental factors could derail it?

Kill the Program is not about the learning program itself but about the environment in which it will live.

> ***Kill the Program gives the team—and especially stakeholders—an opportunity to step back and consider what things they need to do to ensure the soil is rich for planting the program. Some things are clearly in their control; some they can influence but may take more time. Others are outside their control entirely—labeling these can be a useful exercise to release emotional energy the team may be spending worrying about them.***
>
> **— SweetRush CoDesign Facilitator**

Lack of support from gyms or parents came to light as an environmental risk factor, but one that could be influenced through the program design. Parents in particular are a key player in making sure that kids are able to access the training and encouraging them to complete it. The program design would need to embrace and motivate parents to take this role.

Other environmental factors not under The NYSPCC's control or influence included gyms going out of business due to COVID-19 and funding cuts.

Why Virtual Training?

The NYSPCC faced a classic learning and development challenge: **they knew how to educate children about this topic in the classroom, but they needed to extend their reach beyond the classroom, even independent of this COVID-19 moment.** While gymnastics can be a school-sponsored or club-level sport, many coaches and gyms operate and/or are physically located outside of the school system. Ultimately, in order to reach the 600,000 kids who participate in youth gymnastics in the U.S.,[9] The NYSPCC recognized the solution for access and sustainability was online training.

9. https://www.familyeducation.com/life/gymnastics/gymnastics-right-your-child

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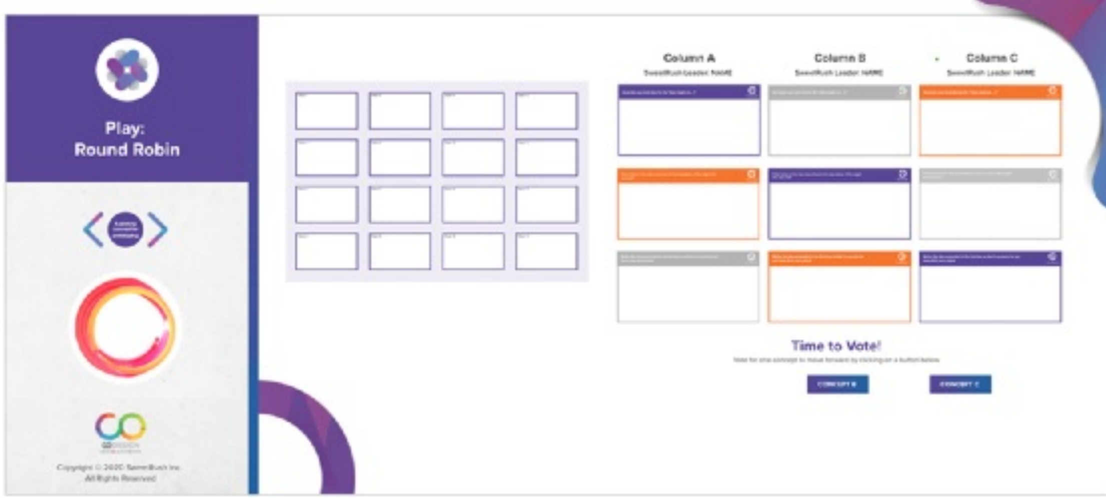
Play

Dreaming Up (and Poking Holes in) a Solution Design

When you're selecting a vendor to partner with in creating a learning program, the traditional sales cycle is a competitive process. Multiple vendors have a limited amount of time to deliver what they believe to be the right/winning solution. However, that solution is based on limited information and, typically, without the possibility of engaging with actual learners.

For The NYSPCC gymnasts sexual abuse prevention program, we did need to participate in a competitive Request for Proposal (RFP) process. And happily, The NYSPCC team was excited about the proposal SweetRush delivered (and SweetRush was pretty stoked on the ideas, too). But we also felt, collectively, that design thinking would ultimately help us arrive at an even better solution.



Design thinking works best when we remain open to all possible ideas. As a team, we decided to start with the ideas we initially proposed, but also recognize that they could be improved upon. Our job was to start to break it apart and figure out how to make it better. It was a great first step for this learning program, because we had multiple audiences due to the different age groups. So we broke into groups focusing on each age group.

—SweetRush CoDesign Facilitator

Using the "Round Robin" activity, each group poked holes in the proposal they were given for a specific age group, then passed it to the next group, who then refined the solution to address the "hole pokes" and improve the design.

The hole-poking was informed by what the team learned in the Connect and Define stages. With the information gained through deep understanding, we can make design decisions that are more aligned to the actual needs of the learners and the project.

—SweetRush CoDesign Facilitator

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The Creative Ecosystem

Ever been in a collaborative setting and felt like you were talking too much or too little? Or that your ideas were not coming fast enough—or they were coming fast and furious? **We all have innate ways we tend to collaborate. What's important to know is that being fast or slow, or talkative or reserved, doesn't impact the quality of your ideas.**

So how do we give each other the right time and space to contribute during CoDesign? That's where the **SweetRush Creative Ecosystem** comes in.

In this activity, individuals identify and share their collaboration "creative creature." The graphic below illustrates our four creativity creatures. We ask everyone to first think about how quickly they generate ideas (that's the X-axis). Then, we ask them to think about how bold they are at sharing ideas (the Y-axis). If they identify as a fast idea-generator and a cautious sharer, their creativity animal is the cheetah. A slow idea-generator and bold sharer is the seahorse.

Participants get excited about naming their "creative creature" and referring to it during collaboration (*"Just give me a second, you know I'm a seahorse!"*). It becomes part of our vocabulary for working together.

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Sketch

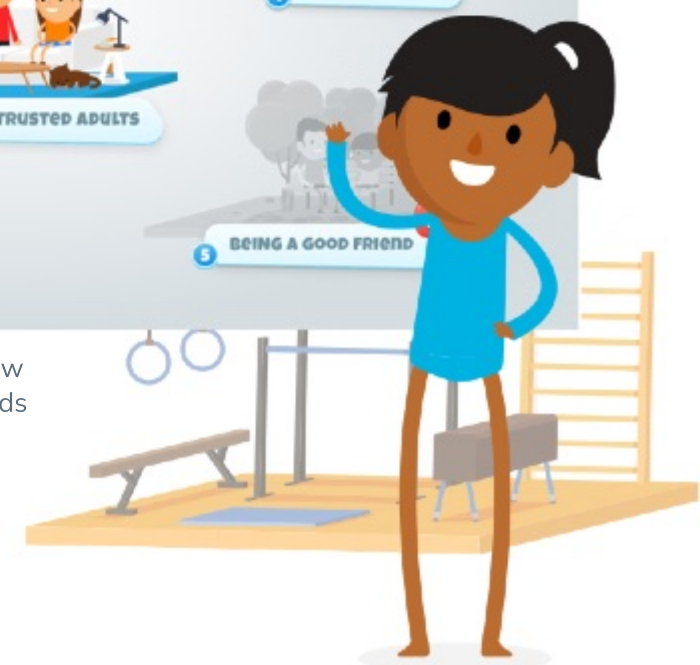
Making Prototypes

An advantage of virtual CoDesign Workshop is, because we are not traveling, we don't need to fit the experience into two sequential days. This flexibility means we can schedule time for the SweetRush team to step away and create a more fully formed prototype (much more than what can be done in a day or afternoon during a live CoDesign Workshop session). And that's just what we did during the Sketch phase.

Read more about how we made the **pivot to virtual CoDesign Workshop**.

Note: Please keep in mind these are sketch prototype mock-ups and do not represent the final product, including content and design.

Each prototype focused on one topic area: using your voice. For the younger audiences, the content focuses on distinguishing between secrets and surprises. For the older audience, we focus on identifying trusted adults.



This image shows a prototype mock-up of how we could use engaging illustrations to lead kids to different areas of the course.

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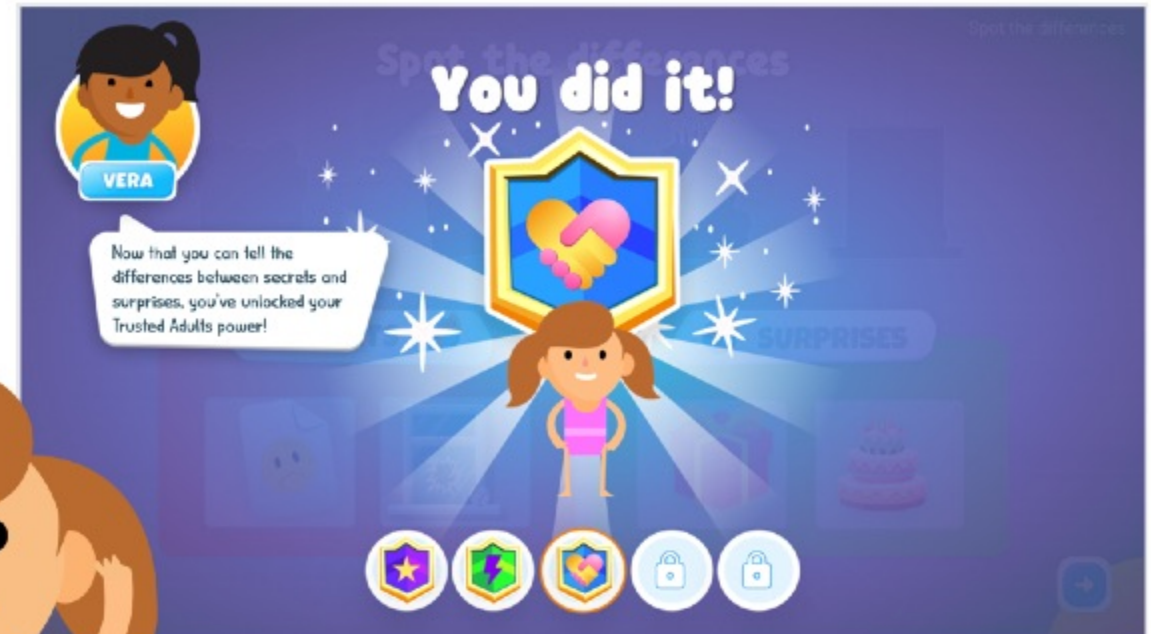
Sketch Prototype for Grades K-3

In this mock-up, we show how, after learning about the difference between a secret and a surprise, kids might drag and drop images to the correct areas of the screen.



This prototype mock-up shows how kids might "unlock powers" by completing activities.

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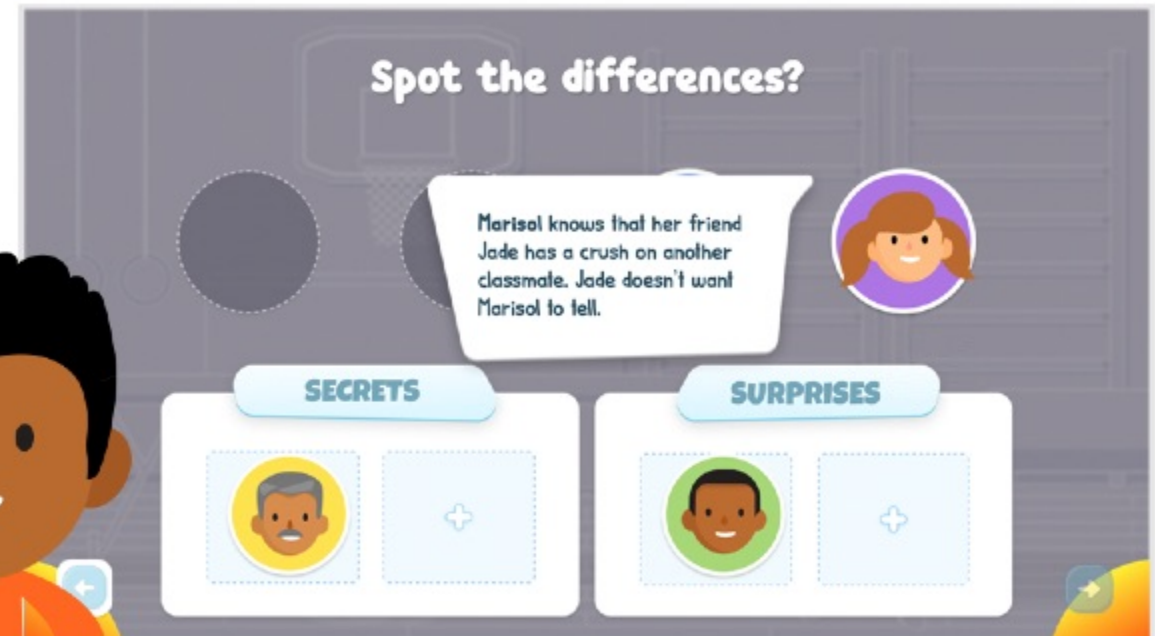
Sketch Prototype for Grades 4-6

For slightly older kids, this sketch mock-up demonstrates how we might present more detail about secrets and surprises, with content relevant for this age group.



As this prototype mock-up shows, examples could include stories relevant to the audience.

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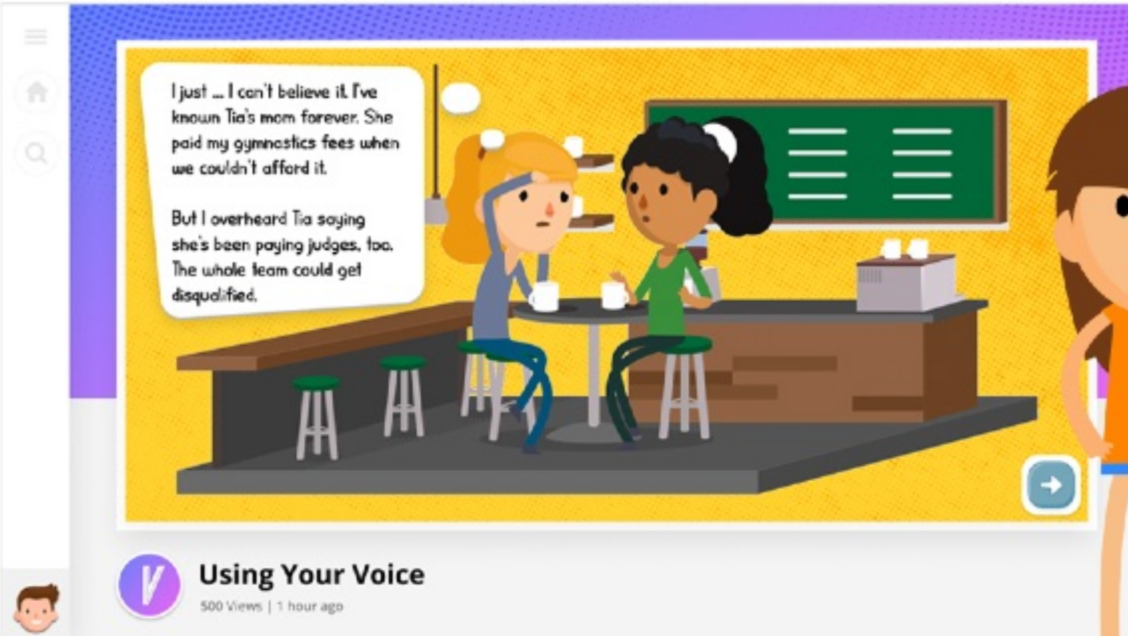
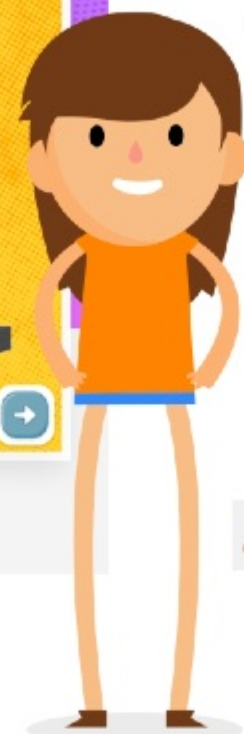
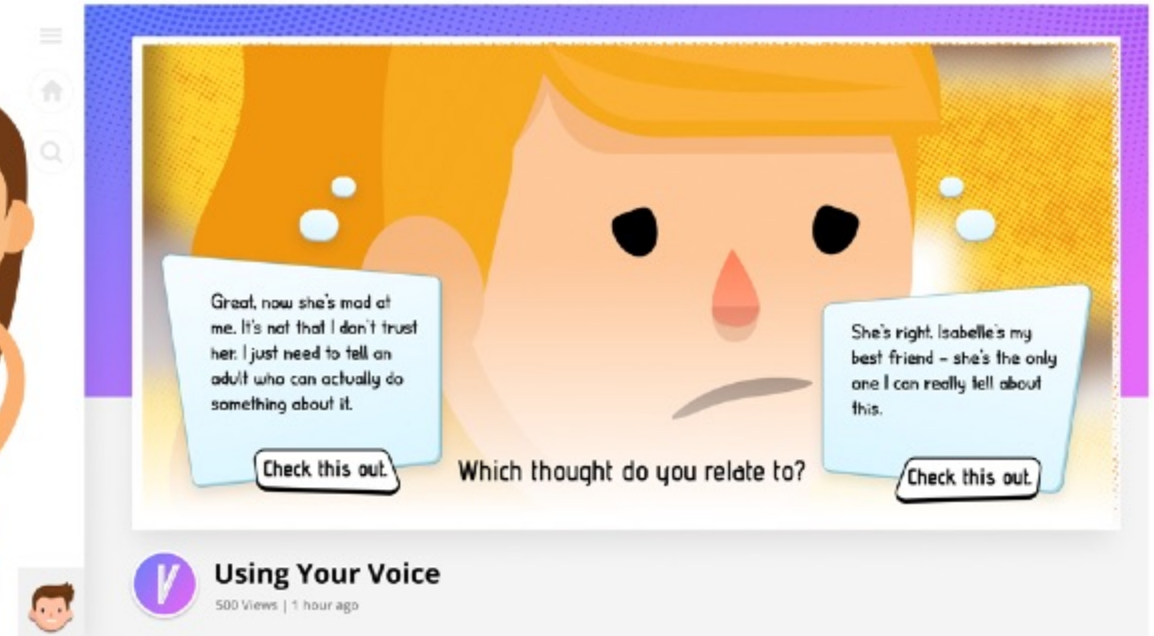
Sketch Prototype for Grades 7-12



For older kids, the approach and story needs to be different to be relevant for that age. This sketch shows the mock-up of a scene with Jasmine and her best friend Isabelle. Jasmine is troubled by something she overheard.





This mock-up shows how we might include a decision point for the learners. Should Jasmine tell an adult who can help, or tell her best friend? Kids then get to see the consequences of the choice.

Knowing that the next step (spoiler alert) would include user testing with kids and their parents, the team felt a tremendous sense of responsibility to get it right. Stories were written, characters were created, and templates were designed.

Accounting for the three age groups, this was a monumental task, but we were ready for user testing after The NYSPCC's review and approval on the prototypes.

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Align
User Testing

For the SweetRush team, after putting their hearts into the prototypes, seeing them being used by actual kids was a great feeling. The tests were set up in Zoom, with the kids sharing their screens, so the team could see what they gravitated to and if they hesitated or got confused in any area. We could see where they lost attention and what we could tweak to make the programs more effective.

> ***One of the key things we uncovered when conducting testing for the K–3 age group was that kids who were older than we expected still struggled with reading. We decided that all interactions and even the buttons they click on need to include voice-overs. The value of testing just can't be overstated here. I have a five-year-old myself and I couldn't have predicted the specific ways kids in this age group interacted with our design.***
>
> **—SweetRush Solution Architect**

Testing with older kids revealed that the avatar style was too cartoony for them, so we did some A/B testing with different avatar styles.

In another important discovery, traits of older kids aligned with the research and The NYSPCC's experience. This age group will often answer in the way that adults think they want them to answer—for example, "I should speak up and tell an adult," is a response this age group thinks is what adults want to hear. In reality, they're more likely to tell a peer than an adult. We saw this play out in the testing by paying attention to what they said and what body language they demonstrated. Testing revealed that we needed to craft the story and questions in a way that helps kids see that adults can be trusted.

We did two rounds of tests, applying the feedback after the first round and then testing with the same learners.

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CoDesign Workshop Outcome—the Solution Blueprint

And we're off! The end product of this collaboration, the Solution Blueprint, documents everything that's been gathered and learned during the process. **It defines a path forward for the solution that will guide The NYSPCC team and the SweetRush team in developing and implementing the program.** It's a robust document—58 pages in this case!—that gives the team everything they need to move forward with creation.

It's always a good feeling to know you're on the right track as you start to build a learning program, with assumptions validated and user input gathered. When you consider the needs—helping kids to speak up against sexual exploitation and abuse, and avoid further pain and suffering—we all feel a powerful feeling of responsibility to get it right for these kids.

Once again, the CoDesign Workshop experience supported the team in crafting the right solution, with all parties active and engaged in shaping the design. Learning programs are important and represent a great investment of time and resources. CoDesign enables buy-in and dramatically boosts the effectiveness and return on investment.

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INSIGHT

The Coronavirus Pivot: Making Virtual CoDesign Workshop

As a 100% virtual company, it was always in our longer-term game plan to transform CoDesign Workshop into a virtual experience, and we were well along the path, pre-COVID-19. The pandemic then accelerated those plans.

> ***We had been thinking about and making steps toward our virtual version for a long time, but then all of a sudden we had two CoDesign experiences sold and no way to travel. It was a rigorous and intensive pivot.***
>
> **—SweetRush CoDesign Facilitators**

How did that pivot happen? Check out these insights from the SweetRush team—many of which can be applied to your own digital transformation.

Reinventing the Schedule

The travel involved with the on-site version imposes a time constraint on the experience; the entire design thinking experience has to happen over two consecutive days. The shift to virtual gave the team freedom to explore an alternative scheduling plan. Could more breathing room in the process add value? Turns out, the answer was yes.

In virtual CoDesign Workshop, teams typically take about a week to a week and a half to arrive at the Sketch step (the fourth step of five). Then, the SweetRush team works internally for about three days to create a prototype. Then, the group reconvenes for the Align step. **The result: our client ends up with a more functional prototype that then speeds up production. And throughout the process, the SweetRush team can work ahead on the Solution Blueprint.**

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We found that the pacing was so much better. The virtual CoDesign Workshop schedule gives everyone more time to ruminate on what we learn, and they come to the next session fresh and ready to keep building. We also found that teams could do some of the work on the Solution Blueprint throughout, so it's not a crunch at the end. Our goal is to get the Blueprint in client in-boxes as soon as possible, following the last session.

—SweetRush CoDesign Facilitator

And, of course, eliminating travel time and costs for all parties makes virtual CoDesign Workshop a more cost-effective option.

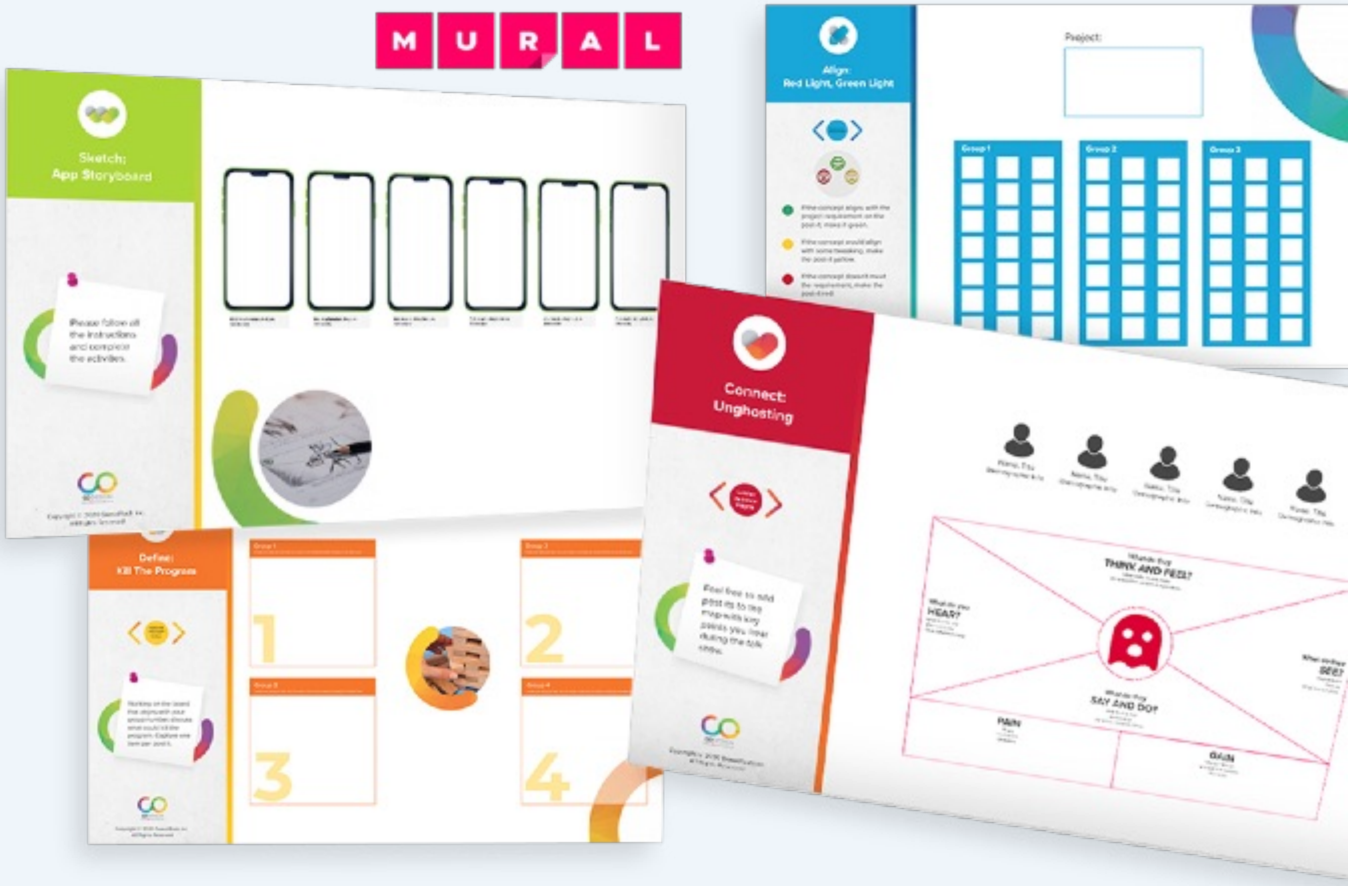
Transforming to Virtual Collaboration

The leader's guide for on-site CoDesign included 35 possible activities with detailed facilitation notes and participant instructions. First step for our virtual transformation: prioritization.

We reviewed the activities to see which ones would translate to virtual, and then prioritized the ones we needed for our first two virtual CoDesigns. Our focus was, how can we modify this activity so it's engaging and interactive? Design thinking cannot be a passive experience.

—SweetRush CoDesign Facilitator

Critical to the transformation was the SweetRush team's choice of Mural as its virtual collaboration tool. They solicited volunteers to try out the new activities and, once the activities were vetted, worked with the graphics team to brand them for the program.



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The Producer Role Comes into Focus

While in-person facilitation is certainly an art, it's typically more low-tech compared to virtual facilitation—and that is certainly the case with virtual CoDesign Workshop. While our on-site facilitation can be conducted with one master facilitator, virtual CoDesign Workshop highlighted the need for an additional role: producer. The producer ensures all of the technology and tools are prepped and ready during the CoDesign Workshop sessions, and helps participants if they're having issues.

> ***This all needs to go off in a really seamless way. There are a lot of moving parts: pre-communication and pre-work, ensuring technology readiness. Each activity has its own choreography.***
>
> **—SweetRush CoDesign Facilitator**

The team also rewrote the leader's guide for the virtual experience to accommodate both the Facilitator and Producer roles. It now features a "run sheet" of the program and a breakdown of steps for each role, including a prep section, Mural specifications, and timing.

A Good Surprise: Increased Engagement

> ***My biggest concern about the transformation was keeping engagement high. The on-site experience is so fun, and I was concerned that it wouldn't translate.***
>
> **—SweetRush CoDesign Facilitator**

In the virtual environment, the team quickly found that setting the right expectations was significant—participants needed to commit the time and be "plugged in." When that happened, so did the magic: the team found that participants were more engaged in many cases.

One reason for this is that the Mural boards give participants access to everything at all times—someone who might be hesitant to get up and look at a wall of Post-it notes at an on-site can find all of the information at their fingertips. "It just gives you so much more visibility into what's going on," said our lead CoDesign Workshop facilitator.

> ***In a virtual workshop setting, participants are much more open and willing to engage in unfamiliar approaches, as they have already had to say goodbye to their accustomed ways of working and their expectation that business will continue as usual. Unlike in face-to-face workshops, they can physically stay within their comfort zone while only their mind is being challenged by a new way of thinking and working.[10]***
>
> **—Sebastian Hartmann, Global Head of Technology Strategy at KPMG, and Lina Krawietz, Co-Founder & Managing Partner at This is Legal Design**

10. https://www.linkedin.com/pulse/benefits-virtual-design-thinking-workshops-sebastian-hartmann/

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SWEETRUSH

Virtual CoDesign Workshop—Meeting the Increased Interest in Design Thinking for L&D

As the word gets out about design thinking and how it can be used to create effective, learner-centric solutions, demand is increasing. The SweetRush team has collaborated on almost the same number of virtual CoDesign Workshop experiences as on-sites, *in less than a third of the timeframe.*

And just like the iterative process they're facilitating, the SweetRush team continually improves CoDesign Workshop with lessons learned from every session. One important evolution is they've started to create modular experiences that can be leveraged during any learning program solution design, if the full CoDesign experience isn't possible.

> ***The goal is to be able to "plug in" activities that will have a positive impact on the solution design. It could be an empathy interview, so we're consulting with learners that we're designing the program for…or taking a beat and looking at the bigger picture constraints and implementation environment, as in the Kill the Program activity.***
>
> **—SweetRush CoDesign Facilitator**

So, what's the prognosis? Will virtual CoDesign Workshop continue when we're past the pandemic? The benefits seem to speak loud and clear.

> ***I'm sure that in the future, when we can travel again, there will be some situations in which we'll want to get together in person. But for the most part, I think virtual CoDesign Workshop will be the go-to solution. From an expense standpoint alone, eliminating travel brings the cost down significantly. The additional benefits—more breathing room in the process, a more functional prototype, and the potential for increased engagement—make virtual CoDesign Workshop very attractive for everyone involved.***
>
> **—SweetRush CoDesign Facilitator**

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Key Takeaways

1. **Design thinking offers incredible benefits for learning solution design.** SweetRush has seen better, more learner-centric solutions, greater stakeholder and team buy-in, and stronger team engagement as a result of our CoDesign Workshop experience.

2. **Virtual CoDesign Workshop brings even more benefits**—greater engagement in the activities, more breathing room in the process, and a more functional prototype (which helps set up the next stages of the project for success).

3. **A best practice for strong virtual collaboration is understanding (and making space for) how individuals “show up” in a collaborative environment.** The SweetRush Creativity Ecosystem gives a name—well, actually, a creativity animal—to traits such as mental processing speed and comfort level in speaking up.

4. **For best results, choose a significant challenge, bring in your best experts, and arrive with an open mind and your best creative energy.** Design thinking can be an incredibly engaging team-building experience that offers a new perspective on what collaborative brainstorming can be!

USING DESIGN THINKING TO CREATE LEARNER-CENTRIC L&D PROGRAMS

Revolutionize

Your Solution Design Process with

SWEETRUSH®

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Contact

Annie Hodson,
Chief Client Solutions and Marketing Officer
415.647.1956
info@sweetrush.com
www.sweetrush.com

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We hope this read sparked your curiosity!

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www.sweetrush.com | info@sweetrush.com

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