Culture & Communication Training
6 Step Checklist to an Effective Training Needs Analysis

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There's a lot to think about when you start to conduct a training needs analysis. Use this checklist to make sure you do not skip any step in creating an effective culture & communication course that is tailored to meet your organization's needs.

1 *Identify account details*

❑ Identify the account's KPI targets, how these are measured, as well as challenges. One of your main goals in designing a new training program should be to equip trainees with the knowledge ands skills that will help them achieve their KPI targets.

❑ Categorize the different issue types that drive KPI scores down and write a brief explanation and examples of these. This will help you prioritize scenarios and tasks that you need to include in your course.

❑ Identify the different customer profiles that you need to include in the program. Customer profiles can be categorized according to their product preference, reasons for calling, attitude, number of months or years as a customer, and other account requirements.

❑ Take note of relevant cultural information that agents need to be trained on. Instead of treating culture training as a collection of country facts, focus on topics that have the most impact on customer interactions (e.g. attitude towards money and debt for a collection account).

2 *Create a profile of your trainees*

❑ Create a profile of your trainees based on input from recruitment. Find out their average years of industry experience, communication skills, and etc. This will help you adjust course content as well as the level of difficulty of activities.

❑ Analyze trainees' strengths and weaknesses within the first few months at work. Your goal is to equip agents with the skills they will need to successfully service customers. For example, if most agents experience difficulty multi-tasking, then you need to make sure that they are well prepared to handle these tasks while in training.

3 *Analyze real samples of calls, emails, chat transcripts, and other authentic text*

❑ Collect and analyze a sample of high, average, and low scoring calls, emails, or chat transcripts. What common gaps do you notice in pronunciation, grammar and vocabulary, discourse skills, interactive skills, as well as resolution? It might be useful to do side-by-side observations to get more insight into the root cause of the communication problems they are encountering.

❑ Create a comprehensive list of routine as well as complex tasks that trainees will perform regularly. Embedding these tasks into your learning program will make the course more authentic and relevant (e.g. handlings escalations, setting up account billing information, etc.).

❑ Take note of any cultural information or instances of intercultural communication breakdown that you need to include in your program. Examples of these are sarcasm, use of indirect language and direct language, tone of voice, and etc.

4 *Evaluate existing training program and course materials .*

- ❑ Examine existing training materials. Identify topics, activities, samples of calls, emails, or transcripts that you can integrate into the new training course.

- ❑ Observe a class to get a sense of what current training practices are like. Your goal is to create a new learning program that is based on best practices in instructional design and training for an occupational context. You can use the following guide when evaluating materials:

  - ✓ **Training Methodology.** Does the course material include a variety of tasks appropriate for different learning styles? Do the materials allow opportunity for group work, problem-solving and peer evaluation? Is the delivery approach student-centered and does it allow for an adequate and appropriate level of trainer elicitation and feedback?

  - ✓ **Course Structure.** Does the course material have cohesion and flow in order to ensure a good level of understanding and engagement from the learners? Does the material have a clear connection to the course aims?

  - ✓ **Objectives and Outcomes.** Are the course aims and outcomes clearly defined and achievable or realistic?

  - ✓ **Content.** Is the course content valid as it aligns to the overall aims with an adequate level of input related practice? Is the content relevant and appropriate for the background, abilities and experience of the learners?

5 *Gather input from stakeholders and relevant departments.*

- ❑ Identify any requirements for the the new training program (e.g. is there any need to use templates? do you use US or UK English? are there any phrases or terminology you should avoid using?)

- ❑ Hold focused group discussions or send out surveys to recruitment, training, and operations. Find out their overall expectations and consider their feedback when you design your new training program. Ensure that you are able to access a range of perspectives across the organization's departments

6 *Use your findings to map out the content of your new course*

- ❑ Now that you have gathered enough data from needs analysis, sit down and think about your training's learning outcomes and objectives, content, activities, resources, external references, as well as assessment and evaluation process.