NEEDS ANALYSIS REPORT

Learning Needs Analysis and Learner Personas

What is really going wrong, who the learners are, and what to build first. An example for a support team's first thirty days.

Gap analysis | 3 personas | Journey map | Recommendations



Instructional design portfolio piece 07. An original example. The company, people and data are illustrative.

EXECUTIVE SUMMARY

The answer on one page

New support agents at Brightdesk (a fictional software company) take about ten weeks to reach the quality target. The goal is six. This analysis found that some of the delay is a training problem and some is not.

10 wks
current time to reach target quality (target: 6)

34%
of new-agent tickets escalated (target: 20%)

2.6 / 5
average confidence handling escalations

Illustrative data for a portfolio example. Real targets would be agreed with a sponsor after a baseline review.

The problem

New agents are slow to handle upset customers and integration questions, and they escalate too many tickets. Managers spend hours repeating the same guidance.

What we found

- Agents lack a routine for tense conversations (**training**)
- Integration troubleshooting is complex and rare (**job aid**)
- Knowledge base search is poor (**tool fix, not training**)
- Weekend agents get little coaching (**process**)

What we recommend

A blended solution: three short modules, two job aids and a coaching guide for managers. Fix the search tool separately, because training will not solve it.

Why this matters. Building a course for every gap would cost more and fix less. The analysis shows where training will work, and where another fix will do more.

METHOD

How the evidence was gathered

Four sources were compared, so no single opinion decided the answer.

Source	What was done	Sample
Stakeholder interviews	30-minute conversations about goals, pain points and constraints	5 leaders
Agent survey	Confidence rating (1 to 5) on eight job tasks, plus open comments	42 agents
Ticket review	New-agent tickets sorted by topic, outcome and escalation	120 tickets
Observation	Shadowing live shifts, including a weekend shift	6 sessions

Questions the analysis set out to answer

1. What should a new agent be able to do at week six, and what can they do now?
2. Which gaps are caused by missing knowledge or skill, and which by tools, process or environment?
3. Who are the learners, and how do they prefer to learn?
4. What is the smallest solution that closes the gap?

Survey: average confidence by task (illustrative)



Scale 1 to 5. Lower bars point to where agents feel least able to do the task. Illustrative data.

Reading the chart. Low confidence does not always mean "needs a course". Searching the knowledge base scored lowest because the tool is hard to use, which is a tool problem. The next page separates the two.

GAP ANALYSIS

Performance gap and root causes

Area	Desired performance	Current performance
Quality score	Target quality by week 6	Reached at about week 10
Escalations	20% of tickets or fewer	34% of new-agent tickets
Upset customers	Calms the conversation, then solves	Defends, apologises repeatedly or hands off
Integrations	Follows a clear diagnostic path	Guesses, then escalates

Root causes, and whether training fixes them

Cause	Evidence	Type	Training?
No routine for tense conversations	Ticket review, observation, 2.9 survey score	Skill	**Yes**
Integration steps scattered across pages	Interviews, 2.4 survey score	Knowledge	**Job aid**
Knowledge base search returns irrelevant results	Observation, survey comments	Tools	No: fix the tool
Escalation rules unclear	Ticket review: inconsistent escalations	Process	Partly
Little coaching on weekend shifts	Observation, interviews	Environment	No: change the process
Agents fear getting it wrong	Survey comments	Motivation	Partly

A training problem when...

People cannot do the task even when everything else is in place. Practice and feedback will help.

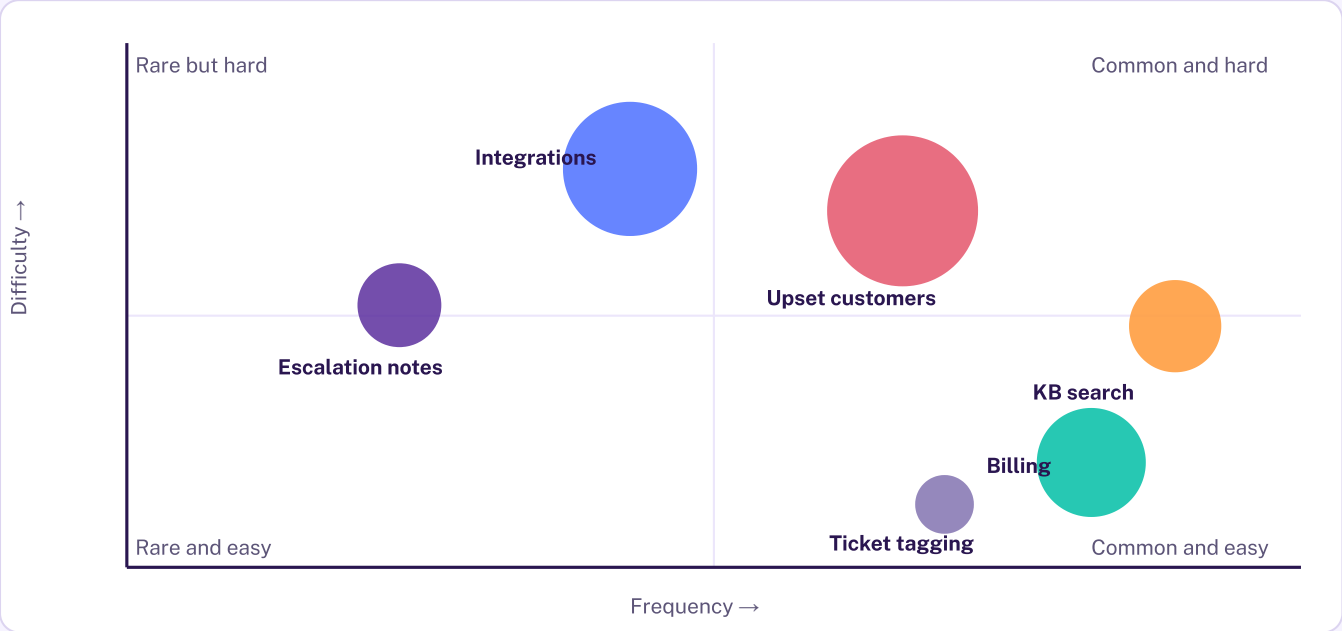
Not a training problem when...

People could do it but the tool, rule or environment gets in the way. Training would not fix that.

TASK ANALYSIS

What the job actually involves

Six core tasks, charted by how often they happen and how hard they are. Bubble size shows how much a mistake matters.



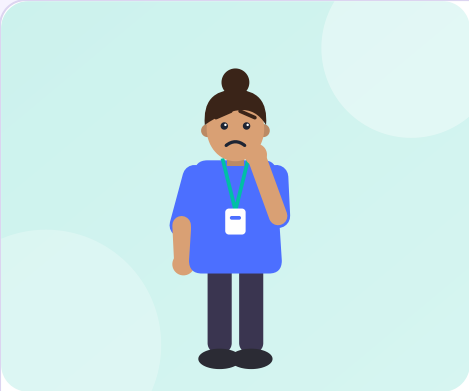
Task detail

Task	Frequency	Difficulty	Impact	Training priority
Handle upset customers	High	High	High	**1 · Practice-based module**
Troubleshoot integrations	Medium	High	High	**2 · Job aid and short module**
Write escalation notes	Low	Medium	Medium	3 · Template and example
Answer billing questions	High	Low	Medium	4 · Quick refresher
Search the knowledge base	High	Medium	Medium	Tool fix, not training
Tag and update tickets	High	Low	Low	Not needed

Result. The hardest, most important task, handling upset customers, is also common. That is where practice-based training will pay off most.

LEARNER PERSONAS

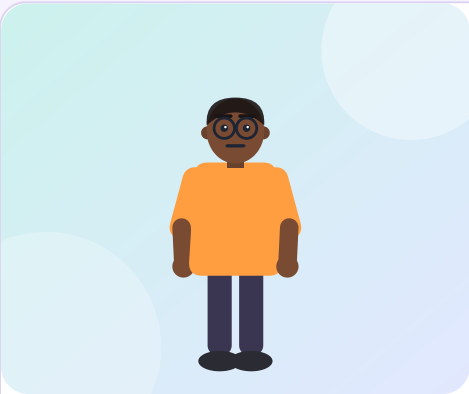
Three learners, three needs



Maya · new starter, week 2

"I know the product, but I freeze when a customer is angry."

Goals	Reach target quality quickly and feel confident on live chats
Frustrations	Too much to remember; afraid of giving wrong advice
Context	Full-time, on shift 8 hours, 15 minutes of learning time a day
Learns best	Short practice scenarios, a mentor, quick feedback



Dev · experienced agent, month 3

"I can do the job. I just need the exact steps when integrations break."

Goals	Solve complex tickets without escalating
Frustrations	Steps scattered over many pages; slow search
Context	Moved from phone to chat; confident, short on patience
Learns best	A one-page job aid and a short worked example



Priya · weekend agent, part-time

"On weekends there is nobody to ask."

Goals	Handle weekend tickets alone with confidence
Frustrations	No coach on shift; misses weekday training sessions
Context	Part-time; learns on her phone between chats
Learns best	Mobile microlearning, self-paced, with on-demand help

JOURNEY MAP

The first thirty days

Confidence rises and falls. The dips are where support has the most effect.



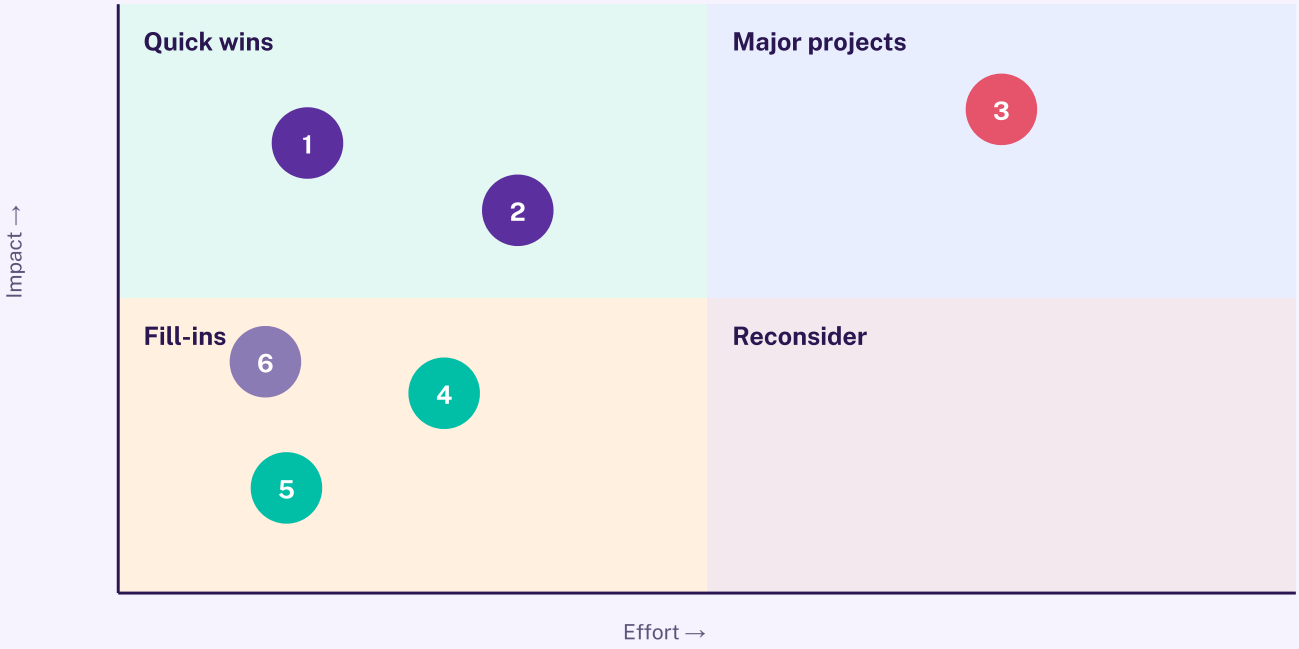
Moments that matter

Day	Feeling	Need	Support
1 to 3	Excited, then overloaded	A clear plan and a few essentials	Welcome module, buddy
7	Overwhelmed	Reassurance and one thing to focus on	Mentor check-in, job aid
14	Shaken by a hard customer	A routine for tense conversations	**Practice scenarios, coaching**
20	Growing confidence	Exact steps for complex tickets	Integration job aid
30	Confident and independent	Stretch goals and feedback	Manager review

PRIORITIES

What to do first

Each need is placed by impact on performance and effort to deliver.



#	Need	Type	Response
1	Routine for handling upset customers	Skill	Practice-based module
2	Integration troubleshooting steps	Knowledge	Job aid + short module
3	Better knowledge base search	Tools	Tool fix, outside training
4	Weekend access to coaching	Environment	Coaching guide + on-call buddy
5	Clear escalation rules	Process	One-page decision guide
6	Billing refresher	Knowledge	Optional microlearning

RECOMMENDATION

A solution that fits the problem

Component	Addresses	Format	Time
Handling tense conversations	Need 1	Mobile-friendly scenario module with characters, practice and feedback	12 min
Integration diagnostics	Need 2	One-page job aid and a short worked-example module	8 min
Escalation decision guide	Need 5	One-page flow chart, linked from every ticket	5 min
Manager coaching guide	Needs 1, 4	Printable guide with a feedback checklist and role-play prompts	30 min
Weekend support plan	Need 4	On-call buddy rota and a short video on how to ask for help	5 min

Not part of the training

Knowledge base search is a tool problem. The report recommends raising it with the product team, because no course will make a poor search tool work better.

Why this blend

Skills improve through practice and coaching. Facts are better supported by job aids at the moment of need. Each response matches the cause.

How success will be measured

Level	Measure	Proposed target
Reaction	Learners rate the practice as realistic and useful	Agreed after pilot
Learning	Scenario assessment score and coach rubric	80% to pass
Behaviour	Escalation rate and manager call reviews	20% or fewer by week 6
Results	Time to reach target quality; manager coaching hours	Six weeks

Targets are illustrative and would be confirmed with a sponsor and a baseline review.

PLAN

Risks, assumptions and sign-off



Assumptions and risks

Assumption or risk	How it is handled
Survey and ticket samples represent all new agents	Check with the pilot cohort and adjust before launch
Product team may not prioritise the search fix	Share the evidence now; do not make training depend on it
Managers short of time for coaching	Short guide, 15-minute huddles, rubric that fits on one page
Weekend staff miss launch sessions	Self-paced mobile modules and an on-call buddy

Next steps

1. Confirm
Agree findings and priorities with the sponsor.

2. Outline
Write the course outline and storyboard for the first module.

3. Pilot
Build, test with six agents and revise before launch.

Sign-off. Approval confirms the analysis, the priorities and the scope of the solution. Changes after approval are recorded in a short change note.

Approved by	Role	Date