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Contents

Chapter 2

Assessing the Needs of Learners

What's in This Chapter?

- Methods for needs assessment
- Tips to improve your assessment
- How to use two key assessment tools
- Guidelines for conducting successful focus groups

Assessment Steps

A training needs assessment identifies how training can meet the needs of an organization and of learners. It serves as the foundation for a successful training program and supports employee performance with the ultimate goal of adding value to meet an organization's business needs. These are the common steps to conduct a needs assessment:

- **Identify the business needs of the organization and determine its culture.** A needs assessment will help gauge whether a negotiation skills workshop is indeed a solution or whether there is some other underlying performance issue present in the organization. Sometimes, an organization may think training will cure all ills, and if so, an assessment will reveal this information. Ask such questions as: Which business strategies would an effective negotiation training support? Which business problems could negotiation skills training help solve? Which data exists that may provide insight into this business need? Which measures will be used to determine whether the training has had an effect on the business?

- **Identify the performance and learner needs.** It's important to know which behaviors need to change to determine whether effective negotiation training is the appropriate solution. Data regarding potential learners' current and required performance, as well as their current and required skill and knowledge levels, will be helpful during this step in the needs-assessment process. Ask such questions as: What do learners need to stop, or to start doing differently? What are the learners' current levels of achievement with regard to being good negotiators, and what should they be? What knowledge and skills should employees learn to be effective negotiators? What are the learning styles of potential participants?

- **Analyze the data.** The data collected will reveal whether an effective negotiation skills workshop should be recommended, and if so, who should be in the training. Look at any gaps in performance, knowledge, and skills, and then determine the best candidates for the training based on the needs of the learners and the organization.

- **Deliver recommendations.** Present the findings of the assessment, including training and nontraining recommendations (processes and procedures, environment, and accountability). Share information regarding how the success of effective negotiation training will be measured, how the training will be designed and delivered, and how the program will be evaluated.

The following methods and tools can help you complete the assessment process.

Methods

Many strategies determine what potential training participants need to learn. Some are more time consuming than others, but here are five that are used frequently:

- **Existing data.** This can include benchmarking reports, performance appraisals, strategic plans, competency models, financial reports, job descriptions, mission statements, and annual reports. The advantage of this method is that the information is readily accessible from the organization and provides hard, reliable data and measures. Because this information is typically gathered for purposes other than training, it is necessary to make inferences from it to determine whether training issues are present.

- **Surveys.** Participants answer a series of focused questions, typically by a deadline; results are easy to tally and analyze. This method is usually an inexpensive way for respondents to provide information quickly and easily, either via an electronic tool or a paper-and-pencil questionnaire. It is important, however, to word the questions carefully so you get the desired data and the questions mean the same thing to each respondent.
- **Interviews.** Interviews are one-on-one discussions, either face-to-face or over the phone, to gather data about individual learner and business needs. Plan interview questions ahead, record the session (with the interviewee's permission), and take notes. Although this is a time-consuming method, it can provide great detail and draw out information that is difficult to obtain from a survey. The interviewer must objectively record responses and not add his or her interpretation to what is said.
- **Focus groups.** A facilitator conducts a group interview, which can provide information about learners' skill and performance levels, the work environment, culture, and perceptions of potential training participants. An advantage to this data-collection method is that all participants can hear and build on each others' ideas. It can also be time consuming, and it may be beneficial to have more than one facilitator conduct a focus group session.
- **Observation.** The observer visits the organization to watch learners do their jobs, then records information regarding such items as behavior patterns, task performance, interactions with others, and use of time. Although this method is helpful to assess training needs and skill levels for individual learners, the observer cannot typically assess mental processes. Individuals may also behave differently around an observer than they would under normal circumstances.

Assessment Tips

Assessing the needs of learners should be carried out in a respectful, thoughtful way. Here are some tips that may help:

- **Gather the data that will provide an accurate and thorough assessment.** Discuss with the client what will be involved in conducting a needs assessment and the approach taken to gain buy-in.

Be sure to collect the data that will address the needs of both the learners and the organization regarding negotiation skills training, and go to the source(s) that will best be able to provide accurate, pertinent information.

- **Focus only on the training and nontraining needs you can provide.** A needs assessment can be a reflection of your competency, so be sure that you are able to deliver on all solutions that arise from assessment results, whether they include negotiation skills training, coaching, or fixing a breakdown in a process. Trainers need to be competent in a variety of learning and performance areas to conduct a thorough needs assessment for an organization. It is also in the best interests of the client to offer more than just a workshop as a possible solution to a performance or business issue.
- **Involve learners directly.** Ask learners about their needs through an interview, survey, or other assessment method; this is a simple way to gather important data and gain buy-in from potential training participants. Information about preferred learning styles, previous experience with negotiation skills training, skill levels, and what they would like to learn in an effective negotiation workshop will enhance the design and delivery of the training, as well as signal to the learners that they directly influence the content and activities in a training session.
- **Use a variety of data-collection methods.** Use two or three methods to ensure that the correct solution will become apparent and that the needs of the clients and learners will be met. This also helps avoid analysis paralysis and the possibility of getting bogged down by too many tools and too much information. Additionally, using different methods will help maintain reliability and objectivity throughout the needs-assessment process.
- **Present information free of trainer jargon.** Make an effort to address decision makers in language that is familiar to them rather than trainer or performance improvement jargon that may confuse or alienate them. As with other professions, the field of learning and development contains its own acronyms, as well as language that those outside the discipline may not understand. Stick to a discussion of success, impact on business issues, strategy, and learner needs.

Two Key Resources

Chapter 11 of this workbook contains two useful tools that trainers can use to assess the developmental needs of learners. Adapt either or both according to the client's requirements.

- **Assessment 11–1: Learning Needs-Assessment Sheet.** This tool follows the steps in conducting a needs assessment and is designed to help you record information obtained by using the interview method of data collection. Adapt this form as needed. The Microsoft Word file is included in the online materials that accompany this workbook.
- **Assessment 11–2: Negotiation Self-Assessment.** Use this assessment as either a training tool or prework for an effective negotiation training session. You may also adapt the instrument for 360-degree assessments. Edit the Word file in the online materials that accompany this workbook.

Using Focus Groups in Training Needs Assessment

Because conducting a focus group takes additional planning and can be more complex to facilitate than the other data-collection methods, what follows is some detailed information that may help you conduct a successful focus group session. A focus group is an efficient way to gather data on the learners' needs for a negotiation skills training session. It is best to have at least two facilitators conduct the focus group: one to lead the session and keep the group on track, and the other to record the information from the session. The facilitators may want to alternate the roles of facilitator and recorder, depending on the length of the session and the strengths of the facilitators. It is important to have an agenda for the session and monitor the flow of conversation, because participants may have a tendency to go off on tangents or complain about a variety of subjects. It is also difficult to capture information when participants speak quickly, so it may be best to use audio or other equipment to record the conversation.

Here is a step-by-step process you can adapt to prepare for and conduct effective focus group sessions to assess the needs of learners:

- Determine the audience for negotiation skills training, and collect the contact information for each person.

- Schedule, well in advance, one or two focus group sessions in private, easily accessible facilities. Allow at least an hour for each session.
- Invite the members of the target audience to attend one or more focus groups to discuss what they would like to gain from negotiation skills training, how improved negotiation could benefit communication in the organization, and the negotiation challenges they face. Limit the group size to five or seven members to encourage participants to speak freely and to record the conversation efficiently.
- Print sufficient copies of **Assessment 11–3: Needs-Assessment Discussion Form** in chapter 11, and bring along extra supplies (such as pens, pencils, and notepads) for the participants.
- As the focus group begins, greet and welcome each person. Introduce yourself and ask participants to introduce themselves by sharing the following information. You may want to write this list on a flipchart or whiteboard:
    - Name
    - Job title
    - Length of service at the organization
    - How would they currently rate themselves as a negotiator on a scale from 1 to 10?
    - What is their biggest challenge when it comes to negotiation?
- Share with the participants the purpose of the needs assessment, how the data will be used, and why you were chosen to conduct the assessment. Ask their permission to record the focus group session.
- Hand out copies of **Assessment 11–3: Needs-Assessment Discussion Form,** and ask the participants to complete it candidly. Be sure they do not put their names on the forms, and explain that you will collect the sheets after the session.
- Ask the participants if they need more time, and when ready, explain that they can still make changes on the form during the discussion if they wish.
- Ask each person in the room the first question on the form. Be sure that you understand what each person says, and don't be afraid to

ask for clarification, examples, or probe for specifics. It is also a good idea to paraphrase responses for the other members of the group. Encourage participants to share what they have in common in response to the question.

- Facilitate the group's discussion through the remaining questions on the form. Start with a different participant each time, and intervene when necessary if one group member starts to dominate the discussion.
- Summarize the common themes and ideas that came out of the discussion with the participants, and verify the accuracy of what was said.
- Collect the participants' discussion forms, and remind them that the information will be used to help determine the content and activities for effective negotiation training that they will be invited to attend. If the training has been scheduled, share this information with the participants.
- Thank the focus group members for their participation.

What to Do Next

- Follow the Assessment Steps outlined at the beginning of the chapter to determine how you will go about conducting a needs assessment for your training.
- Decide the most effective method(s) to use for your needs assessment to gather pertinent data from key stakeholders.
- Determine who will need to be involved in the assessment process and arrange any necessary interviews or focus group sessions.
- Choose the available assessment tools you will use to help you carry out your needs assessment.