Presented Problem or Opportunity

DATES	Start: 2/3/2023 Finish: 2/27/2023
DATA SOURCES	**Client:** ● Development Manager ● Improvement Manager
FRAMEWORK / MODELS	● Harless' Front-End analysis ● Rummler and Brache NBM
DATA COLLECTION METHODS	**Extant Data/Documents** ● Hours logged ● Cost of hours ● List of commonly asked questions **From organization** ● Task Analysis ● Organization Website **Interviews** ● Individual ● Semi-structured

KEY QUESTIONS

Is there a performance issue?

What is the problem?

What are the desired results?

Is it worth solving the problem?

How will you know if the problem is solved?

Who does this problem affect?

Why is this issue a problem?

ANALYSIS

   See Performance Gap and Appendix B.1 for analysis.

NOTES

Needs assessment planning table for discovering TPU's performance problem.

Organizational Analysis

DATES	Start: 02/03/2023 Finish:02/20/2023
DATA SOURCES	**Client** ● Development Manager ● Department Liaison
FRAMEWORK / MODELS	● Performance Improvement/HPT Model ● Rummler and Brache NBM
DATA COLLECTION METHODS	**Extant Data/Documents** ● Org structure chart ● TPU's vision, mission, and strategic imperatives **From organization** ● Kickoff meeting with project stakeholders ● TPU Website **Interviews** ● Group, Individual ● Semi-structured

KEY QUESTIONS
What are the department's missions, values, and goals?
What is the department structure?
What is the department providing?
Who are the department stakeholders?
What is the process flow to complete and hand off a course?
What is the established handoff process?
Where is handoff information stored?
Who has the authority to make handoff decisions?

ANALYSIS
See Overview of the Organization for analysis.

NOTES
Due to organizational constraints, interviews, and data gathering will be conducted within the development group.

Needs assessment planning table for discovering organizational influences for TPU's performance problem.

Environmental Analysis

DATES	Start: 02/03/2023 Finish:02/20/2023
DATA SOURCES	**Client** ● Development Manager ● Department Liaison
FRAMEWORK / MODELS	● Judith Hale's Model for Environmental Scan ● Rummler and Brache NBM
DATA COLLECTION METHODS	**Extant Data/Documents** ● Org structure chart **From organization** ● Kickoff meeting **Interviews** ● Individual ● Semi-structured

KEY QUESTIONS
What is the process flow from course handoff to training?
Where are requests for handoff follow-up coming from?
What are the expectations of course delivery scheduling coordinators?
Is the problem happening across other groups?
Do TPU coordinators have enough knowledge to do their job?
When do processes become difficult with external trainers?
What patterns emerge when scheduling coordinators work with external trainers?
What requests are TPU receiving from customers for future training?

ANALYSIS
See Overview of the Organization and Appendix B.2 for analysis.

NOTES

Needs assessment planning table for discovering environmental influences for TPU's performance problem.

Gap Analysis

DATES	Start: 02/03/2023 Finish: 03/01/2023
DATA SOURCES	Client
FRAMEWORK / MODELS	Performance Improvement/HPT Model
DATA COLLECTION METHODS	**Extant Data/Documents** ● List of questions commonly asked ● Task Analysis and TPU Website **Interview** ● Individual, Semi-structured

KEY QUESTIONS
What is the desired state?
What is the current state?
What data would determine that the desired state is being met?
What is the cost of this gap?
How many unbillable hours are spent?
What does a billable hour cost?
Why is this a problem?
How is course handoff success defined?

ANALYSIS
See Department Impact for analysis.

NOTES

Needs assessment planning table for identifying TPU's measurable performance gap.

Cause Analysis

DATES	Start: 3/2/23 Finish: 4/5/23
DATA SOURCES	Client
FRAMEWORK / MODELS	● Fishbone diagram ● 5 whys ● Gilbert's BEM

DATA COLLECTION METHODS	**Extant Data/Documents** ● List of questions commonly asked ● Process flow developed by the team based on an interview with stakeholder ● Sample handoff email **From organization** ● Task Analysis ● Organization Website **Interviews** ● Individual ● Semi-structured

KEY QUESTIONS

Data/Processes/Rules
- Can you walk us through the process?
- Has there been any formal feedback on the handoff email process? Has there been any negative feedback/frustration displayed?
- How are scheduling coordinators trained?
- How long have the coordinators been in their jobs?
- What are red flags that one handoff may be more difficult than others?

Resources/Tools
- Are standard processes clearly written down?
- How much time can you reasonably commit to clarifying handoff information?
- Are there any other tools or resources you feel would be useful in dealing with handoff clarifications?.
- Can you think of any times when coordinating with external trainers went smoothly? Why do you think it worked well?
- Can you provide a list of common questions received on troubled projects?

Consequences/Incentives
- Does TPU leadership assist in developing the SOWs?
- Are there goals/expectations set for how to interface with customers for questions like this?

Future Questions/5 whys
- Why doesn't the current handoff process/email work?
- Why don't the videos cover the questions?
- Why do coordinators follow back up with questions?
- Why may coordinators not feel confident owning the project after handoff?
- Why are coordinators not involved earlier?

ANALYSIS

See Cause Analysis and Appendix B.3 for analysis.

NOTES

Potential challenges with opportunities to interview downstream stakeholders based on leadership concerns.

Needs assessment planning table for identifying underlying causes contributing to TPU's performance gap.

Intervention Selection / Feasibility Analysis

DATES	Start: 04/05/2023 Finish: 04/18/2023
DATA SOURCES	● Client
FRAMEWORK / MODELS **(final models tbd based on** **additional cause analysis)**	**Selection**: Judith Hale's Intervention families **Feasibility:** ● I² Intervention Matrix
DATA COLLECTION **METHODS**	**Interviews** ● Individual, Semi-structured ● Survey ● Data collected in previous phases

KEY QUESTIONS
What would continue to happen if nothing was done? Is the problem worth fixing? What are potential solutions? How much effort is required to implement the solutions? Is a budget allocated for a solution?
ANALYSIS
See Recommendations for Action and Appendix B.5 for analysis.
NOTES

Needs assessment planning table for identifying possible interventions to eliminate or mitigate the causes contributing to TPU's performance gap.