

Training Needs Assessment Template

Use this template to quickly assess your training challenges and opportunities for improvement. This checklist format allows for an easy review of key areas to help you prioritize your training needs.

Section 1: Identify Pain Points in Training

Evaluate where your current training process falls short by answering these questions:

- How long does it take to fully onboard a new sales agent?
- What is the completion rate for your current training modules?
- Are your trainers spending too much time on repetitive tasks (e.g., compliance updates)?
- Are agents confident in handling real-world scenarios after training?

Section 2: Define Desired Outcomes and KPIs

Set measurable goals and key performance indicators (KPIs) for your training program:

- What are the top 3 outcomes you want to achieve (e.g., reduce onboarding time)?
- How will you measure the success of these outcomes (e.g., performance improvement rates)?

Section 3: Assess Infrastructure Readiness

Ensure your organization has the right infrastructure for AI-based training:

- Do you currently have a Learning Management System (LMS)?
- Do you have access to training data (scripts, policies, FAQs)?
- Is your IT team prepared to support integration with AI platforms?

Section 4: Prioritize Core Features

Identify the most important features for your training platform:

- Adaptive learning modules (personalized training paths)
- Dynamic scenario simulations (real-world practice)
- Automated compliance tracking and reporting
- Performance analytics dashboards

Once you've completed this assessment, discuss your findings with your team. Contact Biz4Group for a consultation on building a customized AI-powered training solution.