

Needs Analysis Worksheet for a Job Aid

Planning is critical to developing an effective job aid. Use the following needs analysis worksheet to help you in the design phase. On a separate piece of paper, answer the following questions:

1. Why is the job aid needed?
2. Who will use the job aid?
3. What level of experience does this group have with the topic or company?
4. Where will the job aid be used?
5. Have job aids been used before with this group? If yes, what format did or did not work well for this audience?
6. What topics will be included and what is the logical order for the topics? (Attach an outline for job aid.)
7. Will the job aid be incorporated into an instructor-led or e-learning training program? Will training be required for the job aid?
8. What budget is available for this project?
9. What media and format will be used?
 - Print-based: Indicate size _____ and format: paper (regular), booklet, poster, tabletop tent card, laminated card, other _____.
 - Online help: Write down name of help authoring tool.
 - Internet-based: Write down the name and URL of the Website for posting.
 - Multimedia-based: Indicate format: VCR tape, DVD, online video clip, or audio.
10. How will users access the job aid?
11. How will the job aid be implemented and distributed initially? What are the plans for new staff getting the job aid?
12. What are the maintenance considerations and timing for updates?
13. Select the type(s) of job aid to be developed.
 - Decision tree
 - Checklist
 - Step-by-step instructions
 - Flowchart or graphic map
 - Look-up table
 - Worksheet or form
 - Reference source
14. Write down the timeframe for this project.
 - Proposed date for initial draft _____
 - Proposed date for final draft _____
 - Proposed date for pilot _____
 - Proposed date for implementation _____
15. Write down the names of individuals on the project team.
 - Developer(s)
 - Content provider(s)
 - Subject matter expert(s)
 - Content reviewer(s)
 - Final approval