



## Business Initiative Questionnaire

### Business Goals

1. What are the business goals of the initiative?
2. Are the business goals quantifiable? If yes, how?
  - If yes, go to question 3.
  - If no, go to the next section below.
3. What current (or planned) business measurements will be used?
4. What is the current baseline for these numbers?
5. What is the improvement goal?

### Initiative Outcomes: Processes, Tasks, and Skills

6. What processes and tasks will employees need to complete or skills will they need to gain for the organization to meet its business goals?
7. Who will be responsible for completing the processes and tasks or using new skills?
8. Which initiative outcomes are associated with which business goals?
9. What is the confidence level that the initiative outcomes will result in achieving the business goals?
10. Which of the initiative outcomes are new, unique, or difficult?
11. What potential issues besides training will affect the ability of the employees to complete the initiative outcomes?

### Proficiency

12. Will employees be expected to be proficient in the processes, tasks, and skills after training?
13. How many times will an employee likely need to complete processes and tasks and practice skills before they become automatic or habitual?

# Business Initiative Questionnaire (continued)

## Implementation, Accountability, and Measurement

14. Do the business goals warrant developing an implementation plan to monitor the associated initiative outcomes?
  - If yes, go to question 15.
  - If no, end.
15. How will you know whether employees are completing the new processes and tasks and using the new skills on the job?
16. Who is accountable to ensure the appropriate processes, tasks, and skills take place on the job?
17. What coaching, mentoring, or review processes are you planning to use to ensure the appropriate initiative outcomes take place on the job?
  - If none, go to question 18.
  - If you have a plan, go to question 19.
18. Does a coaching, mentoring, or review process already exist in the business that you could modify to measure or monitor the initiative outcomes? If not, what should the process be?
19. Would the reviewer benefit from a review checklist of the key processes, tasks, and skills?
20. What is the plan if the appropriate processes, tasks, and skills are not demonstrated?

# Business Initiative Checklist

Use the information gathered from the Business Initiative Questionnaire to complete the checklist below. Put an X in the appropriate column for each item.

<b>Business Goals</b>	Yes	No	NA
Business goals are identified.			
Business goals are quantifiable.			
The business goals are currently measured.			
There is a plan to measure the business goals.			
<b>Initiative Outcomes: Processes, Tasks, and Skills</b>			
Processes, tasks, and skills are identified.			
There is a logical relationship between the initiative outcomes and the business goals.			
There is a high level of confidence the initiative outcomes will enable us to reach our business goals.			
Many factors besides training will impact the ability of the employees to complete the initiative outcomes.			
A significant number of the initiative outcomes are new, unique, or difficult.			
<b>Proficiency</b>			
We expect employees to be proficient after training.			
<b>Implementation, Accountability, and Measurement</b>			
We can identify the employees who are responsible for completing the processes and tasks and for gaining the skills.			
We can identify the employees who will be accountable to ensure the processes, tasks, and skills will be completed on the job.			
A review process to determine if the processes, tasks, and skills are being completed on the job exists or will be developed. <b>Note:</b> circle the word exists or developed (in the previous sentence) if the answer is yes.			
A checklist of the key processes, tasks, and skills will be developed for the reviewer.			
A plan exists or will be developed to handle situations when the appropriate processes, tasks, and skills <b>are not</b> being completed on the job. <b>Note:</b> circle the word exists or developed (in the previous sentence) if the answer is yes.			