



Project/Initiative Business Goals and Implementation Questionnaire

Level Four – Business Goals

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

Level Three – Tasks, Process, and Skills

1. What types of processes, tasks, and skills will employees need to complete if we are to meet our business goals?
2. Who will be responsible for completing these processes, tasks, and skills?
3. Which of the processes, tasks, and skills are new, unique, or difficult?
4. How do we know that these processes, tasks, and skills will lead to our business objectives?
5. What potential issues besides training will have an impact on our ability to meet our business goals?
6. Which processes, tasks, and skills are associated to which business goals?

Proficiency

7. Do we expect employees will be proficient in the processes, tasks, and skills after training?
8. How many times will an employee need to complete processes, tasks, and skills before they become automatic or habitual?

Implementation, Accountability and Measurement

9. Do the business goals warrant the development of an implementation plan to monitor the associated processes, tasks, and skills?
 - If yes, go to question 10.
 - If no end.
10. How will we know if employees are completing the appropriate processes, tasks, and skills on the job?
11. Who is accountable to ensure the appropriate processes, tasks, and skills take place on the job?
12. What coaching, mentoring, or review process will be used to ensure the appropriate processes, tasks, and skills take place on the job?
 - If none go to question 13.
 - If a process exists go to question 14.
13. Is there an existing coaching, mentoring, or review process that exists in the business today that we could modify to measure or monitor the processes, tasks, and skills? If not, what process should we use?
14. Would the reviewer benefit from a review checklist of the key processes, tasks, and skills?
15. What is our plan if the appropriate processes, tasks, and skills are not demonstrated?



Project/Initiative Checklist

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

Business Goals	Yes	No	NA
1. Business goals are identified.			
2. Business goals are quantifiable.			
3. The business goals are currently measured.			
4. There is a plan to measure the business goals.			
Processes, Tasks, and Skills			
5. Processes, tasks, and skills are identified.			
6. A significant number of the processes, tasks, and skills are new, unique, or difficult.			
7. There is a logical relationship from the processes, tasks, and skills to the business goals.			
8. A significant number of factors besides training will impact our ability to meet our business goals.			
Proficiency			
9. We expect employees to be proficient after training.			
Implementation, Accountability and Measurement			
10. We can identify the employees who are responsible to complete the processes, tasks, and skills.			
11. We can identify the employees who will be accountable to ensure the processes, tasks, and skills will be completed on the job.			
12. A review process to determine if the processes, tasks, and skills are being completed on the job exists.			
13. A review process to determine if the processes, tasks, and skills are being completed on the job will be developed.			
14. A checklist of the key processes, tasks, and skills will be developed for the reviewer.			
15. A plan exists to handle situations when the appropriate processes, tasks, and skills <i>are not</i> being completed on the job.			
16. A plan will be developed to handle situations when the processes, tasks, and skills <i>are not</i> being completed on the job.			



Project/Initiative Summary and Recommendation

Use the information gathered from Project or Initiative Overview Questions and Project or Initiative Checklist to complete the Project or Initiative Summary and Recommendations.

Business Goals

List the business goals in this section.

Business Goals Measurement or Success Criteria

Define the plan to measure the business goals or success criteria in this section. This includes:

- What is the plan to measure business goals (if any)?
- Is this a new or existing business measurement?

Alignment of Processes, Tasks, and Skills to Business Goals

Provide a summary of the following information:

- List each business goal followed by the associated processes, tasks, and skills tied to that business goal.
- Include a high-level analysis of how well the processes, tasks, and skills relate to the business goals.
- Provide any recommendations of additional analysis that will or should be completed.

Proficiency

Describe your sense for how proficient employees will be after training. Note: The less proficient they will be, the more important the plan for implementation, accountability, and measurement.

Implementation, Accountability, and Measurement

Provide a summary of the following information:

- Match the associated processes, tasks, and skills to the employee groups responsible to complete the actions and behaviors.
- Identify the employees accountable to ensure the processes, tasks, and skills take place on the job. Note: that none exists if applicable.
- Describe the coaching, mentoring, or review process to ensure the processes, tasks, and skills take place on the job. Note: that none exists if applicable.
- State if a checklist of the key processes, tasks, and skills for the coach or reviewer exists or will be developed. Note: that none exists or will be developed if applicable.
- Describe the plan for dealing with situations when the appropriate processes, tasks, and skills *do not* take place on the job. Note: that none exists or will be developed if applicable.

Recommendations

Provide your recommendations based on the business goals and needs as well as the information provided above.

This should include:

- Overall analysis of the information above.
- Recommendations for development of plans to support the project or initiative after training or rationale for not developing. This could include lack of business partnership, low business need or impact, etc.
- Strategy for measurement and evaluation.

Recommendations Developed by

Project/Initiative Leader



Project/Initiative Summary and Recommendation

Business Goals

Business Goals Measurement or Success Criteria

Alignment of Processes, Tasks, and Skills to Business Goals

Proficiency

Implementation, Accountability, and Measurement

Recommendations

Recommendations Developed by

Project/Initiative Leader



Example – Review Checklist

The Review Checklist can be used to evaluate key process, tasks, and skills on the job.

Maintain Customer Master Records		
Can the employee:		
Determine Marketing Information?	Yes	No
Determine Customer Contact Information?	Yes	No
Determine Payment Information?	Yes	No
Determine Correspondence Information?	Yes	No
Mark a Customer Master Record for Deletion?	Yes	No
Determine Head Office to Branch Relationships?	Yes	No
Generate a Blocked Account Report		
Can the employee:		
Execute a Blocked Account Report?	Yes	No
Unblock an account at the customer level?	Yes	No
Process Rebates		
Can the employee:		
Post a G/L Rebate accrual posting?	Yes	No
Verify Vendor master data exists?	Yes	No
Process Rebate Vendor Invoice?	Yes	No