

Training Needs Assessment SOP

Document no.	SOP-TRN-004
Revision	1.0
Owner	Training Manager
Effective date	September 15, 2026
Review cycle	Every 12 months

1. Purpose

To identify real skill and knowledge gaps across roles and teams, prioritize them against business needs, and turn the findings into a specific, approved training plan.

2. Scope

Applies to periodic and ad hoc assessments of training needs across departments. Delivering the resulting training is covered by the employee training SOP.

Definitions

Skill gap	The difference between the skill or knowledge level a role requires and what an employee currently demonstrates.
Role profile	The documented list of skills, knowledge and certifications expected for a given role.
Training plan	The prioritized list of training needed, with target groups, timelines and estimated cost or resourcing.

3. Responsibilities

Training Coordinator	Runs the assessment process, collects data and drafts the training plan.
Department Manager	Provides input on team performance gaps and priorities and reviews the resulting plan for their area.
HR Business Partner	Shares relevant performance and role data and helps prioritize needs against business goals.
Employee	Provides honest input on their own skill gaps and development interests through surveys or discussions.

RACI matrix

Activity	Training Coordinator	Department Manager	HR Business Partner	Employee
Collect performance and skill data	R/A	R	C	C
Survey employees and managers	R/A	C	I	R
Compare skills against role profiles	R	C	R/A	I

Activity	Training Coordinator	Department Manager	HR Business Partner	Employee
Prioritize training needs	R	C	R/A	I
Approve the training plan	R	R/A	C	I

R = Responsible, A = Accountable, C = Consulted, I = Informed

4. Materials and PPE

Materials, tools and systems

- Role profiles or job descriptions
- Performance review data
- Employee and manager survey templates
- Skill gap matrix
- Training plan template

5. Procedure

Step	Task	Owner	Done
5.1	Define the scope of the assessment The training coordinator agrees with department managers which teams, roles or business changes the assessment will cover, such as a new system rollout or annual skills review.	Training Coordinator	☐
5.2	Gather role requirements The training coordinator collects current role profiles or job descriptions to establish the skills and knowledge each role is expected to have.	Training Coordinator	☐
5.3	Collect performance and skill data The HR business partner shares relevant, non-confidential performance review themes and the department manager shares observed skill gaps on the team.	HR Business Partner	☐
5.4	Survey employees and managers The training coordinator sends a survey to employees and managers asking about confidence in key skills, desired development, and any tools or processes causing difficulty.	Training Coordinator	☐
5.5	Build the skill gap matrix The training coordinator compares survey and performance data against role profiles to build a skill gap matrix showing where the biggest gaps exist by team or role. Checkpoint: Gaps are based on actual data from multiple sources, not a single manager's opinion.	Training Coordinator	☐
5.6	Prioritize the identified needs The HR business partner and training coordinator rank the identified gaps by business impact, urgency and number of people affected, in discussion with department managers.	HR Business Partner	☐
5.7	Map gaps to training options The training coordinator identifies whether each priority gap is best addressed with existing courses, new content, on-the-job training or an external program.	Training Coordinator	☐

Step	Task	Owner	Done
5.8	Draft the training plan The training coordinator drafts a training plan listing priority needs, target groups, delivery method, timeline and estimated cost or resourcing.	Training Coordinator	☐
5.9	Review and approve the plan Department managers review the draft plan for their area and the training coordinator finalizes it once feedback is incorporated and budget is confirmed. Checkpoint: The final plan has an accountable owner and target date for every priority item.	Department Manager	☐
5.10	Communicate the plan The training coordinator shares the approved plan with department managers and affected employees so expectations for upcoming training are clear.	Training Coordinator	☐
5.11	Hand off to delivery The training coordinator schedules the approved training items following the employee training SOP and tracks them through to completion.	Training Coordinator	☐

6. Quality checks

- Every identified gap is supported by data from at least two sources.
- The training plan assigns an owner and target date to each priority item.
- Department managers sign off on the plan for their own team before it is finalized.
- Prior assessment findings are reviewed for progress before a new assessment begins.

7. Records

- Survey results and performance data summaries
- Skill gap matrix
- Approved training plan
- Department manager sign-off on the plan

8. KPIs

- Percentage of identified gaps addressed within the planned timeline
- Survey response rate from employees and managers
- Number of priority gaps closed per quarter
- Manager satisfaction with the resulting training plan

9. Common mistakes

- Basing the assessment on one manager's opinion instead of broader data.
- Skipping prioritization and trying to address every gap at once.
- Building a training plan with no owner or timeline attached to each item.
- Never revisiting the plan to check whether gaps were actually closed.

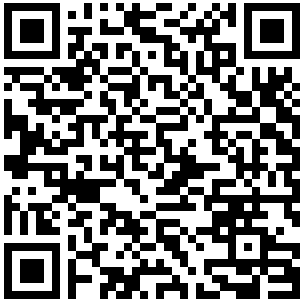
10. Revision history

Revision	Date	Description	Reviewed by
1.0	September 15, 2026	Initial release	Alexa Uskova

Approval

Prepared by	Approved by	Date

This is a template. Adapt it to your organization, equipment and local regulations before use.



Scan for the latest version

Opens this template online, where you can download it again in Word, PDF, Excel or CSV — free, no sign-up.

Or **add it to Perfect Wiki** so your team can find it and ask questions about it in Microsoft Teams, Slack, kChat or Mattermost.