



## GUIDE TO CONDUCTING QUALITY NEEDS ASSESSMENTS

By Dev Pathik

This needs assessment guide has been developed to assist you in building relationships with prospective clients. During the needs assessment process you will use inquiry to build credibility as you learn about the client's organization, their needs, and their objectives.

### What Prospective Clients Really Want

When clients contact you, they do not want to know in general terms what it is that you do. What they really want is to know what (specifically) you can do for them. After all, in order to make a decision the client needs to know what they are deciding on. If you do not offer a specific solution the client may decide not to use your services simply because they do not fully understand exactly what they would be purchasing.

### Communicating Value -The Only Thing That Matters

Your job during the needs assessment/proposal process is to communicate the value of your services as they relate to the client's needs. This does not necessarily mean the lowest price, but instead value refers to the ability of your organization to serve the client's needs in a way that reflects their organization's vision of success.

Your goal is to communicate value. If a client chooses not to use your services, it is for one reason:  
The decision maker did not see the value in what you proposed.  
-Dev Pathik



### **What If The Prospective Client Wants Answers Now?**

If the prospect is rushed (looking for price and times) or if they want a quick response to very specific questions, it is a clear sign that you are dealing with an information gatherer. You will need to facilitate a discussion to slow them down so that you can engage in a dialogue about the real underlying issues. If you get off the phone or end an interview feeling as though *you* have unanswered questions about the value of your services as they relate to the client's needs, you have not completed the interview. This means that you are not prepared to communicate value in a proposal. In the event that you find yourself in this position, get back on the phone and ask the client a few more questions. This is the only way you will be able to prepare a quality proposal. To avoid this situation, make a point of asking plenty of questions during the interview to get a full understanding of the client's organization, their needs, the group that they are interested in having you work with, and their budgetary needs.

### **What if the client just wants to know what you do?**

If a client wants you to explain or advocate for your services (can you tell me what it is that you do) *you need to respond*. Not responding or saying that you have a few questions for them will not engender trust. Share your value proposition statement and a list of services with the person who poses this question. Then, let them know that after your conversation you will send them a fax packet and a mailed packet. Ask them if they have been to your web site and let them know that, if they would like, you can prepare a written proposal outlining a specific service package for their organization. If this is appealing to the caller/prospect, then set up a time to conduct a needs assessment.



## Three Phases of the Needs Assessment Interview

### 1. Big Picture and Organizational System Interview

This phase of the needs assessment process is designed to help you understand the larger context within which you will be working. With this level of understanding you should be prepared to present solutions or training options that will complement the existing system. This interview focuses on three major areas:

**A. How products or services move through the organization.** This is an important interview for every type of organization you may serve, including social service agencies. These questions will help you understand the various departments and the process that the organization uses to achieve their mission.

**B. How information and decisions move through the organization.** This is a critical line of questions. It will help you understand the frequency or lack of meetings, how electronic mail, voice mail, and other forms of communication are used. It will also inform you of the communication system that your work must support.

**C. How things have changed over the past 18 months and how they are expected to change over the next 12-18 months.** Every organization changes constantly. Changes in leadership, new offices, new services, downsizing, going public, seeking new sources of funding, and developing new products are all critical components to a business's survival. You need to know what changes have or will be occurring so that you can create an intervention that supports those changes.

### 2. Specific Needs Interview

This interview may begin prior to the Big Picture interview. It is a line of questions designed to help you understand the client's specific, current, and upcoming challenges. This means listening to the client's goals or helping the client identify specific goals. During this phase of the needs assessment you will be asking the client questions about the group that they are interested in having you work with. You need to know their hopes and dreams for that group. Then you will ask them to identify objectives for your training program or intervention.



### **3. The Ideal Outcomes / Dreaming Big Interview**

Now that you understand their organization and some of the specific objectives they have it is important to engage the client in a discussion about their dream scenarios. This line of questions focuses on ideal outcomes and things that may be beyond the scope of this particular training, however asking the client to identify ideal or dream scenarios for their group(s) is a great way to gain insights into their real desires. It is a critical part of the interview because it deals with the possibilities for an on-going or more comprehensive relationship between your organization and theirs. You will also find that many of their ideal scenarios can be addressed during the program that you will propose. Like the Specific Needs Interview and the Big Picture interview, the Ideal Outcomes interview questions may be intertwined in your dialogue.

#### **Sample Big Picture Questions**

- If you don't mind, I'd like to ask you some questions about the school you are working with so I can determine with you what the right approach is to take with your group. Can you tell me about the school and school district? What is it like (demographic, environment...)?
- Is there anything about your school community that makes it unique from other groups we might serve?
- Has your school undergone any changes that are affecting the student body? New principal, new districting, new buildings?
- Is there any school wide curriculum initiatives going on right now?



### Sample Specific Needs Questions

Sample Segue -“Great. Thanks for giving me the big picture. What can you tell me about the team that you are interested in having us work with”.

- Okay, thanks that helps me understand a little more about your school and what makes it unique. Can you tell me about the group you would like to bring here?
- How many males and females? Will you have sponsors?
- How is this group different from previous groups you’ve worked is?
- Do you have dates in mind?
- What other trips/field trips has this group done in the past?
- What are the most pressing needs for your group?



### Sample Ideal Outcomes/Dreaming Big Questions

- If this experience was everything you could hope for, what would you like to be able to say it would do for your students?
- At Heifer, we use a progressive learning process so that many groups we serve return to us year after year. Do you have a picture in your mind for how this might become an annual and progressively more valuable experience for this group?
- Once you and I have made some decisions about this year's experience, I will prepare a proposal that will outline options for next year and beyond.
- Just one more question. Ten years from now, if you're dreaming big, what would you like for this group to remember about this year and the influence you were able to have with them as a teacher (leader)?
- Is there anyone else who is going to be involved in making the decision about this retreat? We will not contact them, but we can at least put their name on the proposal.
- "Based on what you've shared, what I would recommend is our XYZ program. The cost is \$\$\$\$. Does that sound like the kind of program I should outline in a proposal?" *(if not, go to a shorter program option)"*