

## Starting with the Need PMM5 Postscript™ Number 2

**Background Information:** In *Professional Meeting Management*®, fifth edition, Monica Myhill and Jack Phillips discuss the importance of starting with the end in mind. Their perspective is that planning must begin with the desired end state in clear focus. In Chapter 2, Starting with the End in Mind, they:

- List the reasons to establish meeting objectives for planning and designing a meeting or event
- Describe the necessary data to be collected prior to the creation of meeting objectives
- Discuss the need for measurable meeting objectives for meetings and events

**PMM5 Postscript Use:** At the outset of chapter 2, the authors write, “In a world that seeks accountability and return on investment (ROI), the importance of defining objectives for meetings and events cannot be overemphasized...Before meeting objectives can be established, the stakeholders of a meeting or event must be identified and their needs, desires, and challenges established” (Myhill & Phillips, 2006, p. 18). This quote describes the need for and basis of a needs assessment. This PMM5 Postscript dissects the discovery phase that all meeting managers should conduct with stakeholders. This PMM5 Postscript also includes additional group discussion or research projects to supplement the PMM5 chapter.

**Learner Outcomes:** At the completion of this reading, you should be able to:

- Define a needs assessment.
- Identify how written needs assessments are used in executing meetings.
- Describe how a needs assessment can also function in the discovery stage with stakeholders.
- Explain how meetings are change events.
- List the three things meetings can change.
- Select questions to use during the discovery phase of meeting planning.

**Related PMM5 Chapter:** Chapter 2, Starting with the End in Mind  
Authors: Monica Myhill, CMP and Jack Phillips, Ph.D.



## Defining a Needs Assessment

A needs assessment is a process of identifying requirements in order to select methods, means, tactics, tools and approaches for solving the problems. For meeting managers it is the process of discovering the needs related to the meeting. Discovering the needs may not require a formal written document or survey but rather be a dialogue upon which meeting managers will make decisions about executing meetings. Some meetings will be based upon formal needs analysis documents; many meetings will be planned from the foundation of a needs assessment conversation.

Often those “needs” are items like:

- Members’ expectations
- Performance problems
- Training needs
- Management’s communication needs
- Sponsors’ expectations
- Attendees’ expectations

As the list of “needs” can vary, the use of needs assessments can vary. Needs assessments can be done for:

- Organizations
- Membership/Employees
- Meetings and conferences
- Training programs

In cases where needs assessments are formal surveys that are done across all members/ employees or a sampling of the population, Glen Ramsborg defines the ten steps for conducting a needs assessment (Ramsborg, 2002):

1. Make a decision to complete a needs assessment
2. Develop focus and specific objectives of the needs assessment
3. Identify meeting stakeholders and specific individuals to be involved
4. Determine the time frame budget and staffing required to conduct the needs assessment
5. Select data collection methods
6. Collect data
7. Analyze data
8. Prioritize findings
9. Report the results
10. Utilize the results to create meeting objectives, attendee outcomes and program design

Meeting managers are primarily interested in needs assessments for meeting, events and conferences. Meeting managers may, therefore, go through all ten steps during a formal needs assessment. All meetings should go through a stage of discovery or assessment.

The desired goal of a needs analysis is to describe the “need” as a gap separating what people know, do or feel from what they should know, do or feel. It is beyond the scope of this PMM5 Postscript to fully describe the steps involved in a needs assessment. Rather this PMM5 Postscript will serve as a guide for the question to ask in Step 2 and Step 3 of a needs assessment.

## Reasons to Hold Meetings

Meetings are held to change what people know, what they do and how they feel. Accordingly, meeting may have overarching goals including to;

- Provide information
- Create ideas
- Decide on issues
- Delegate
- Share work
- Persuade, involve or inspire
- Maintain relationships
- Celebrate

In each of these cases, the core reason for the meeting can be attributed to changing how or what people:

**Know**  
**Feel**  
**Do**

## Starting a Needs Analysis Dialogue

During a needs analysis, meeting managers must engage in dialogue not simply a question and answer sessions with stakeholders. An answer may not truly be an “answer” and will often warrant further explanation, questioning and drilling down to get real answers. Some questions to assist meeting managers in the dialogue include the following:

- Why do you think there is a need for the meeting?
- What is the difference between the current situation (What is being done/known/felt now) and the desired state (what is supposed to be done/known/felt)?
- Is it important? Why?
- Is the discrepancy caused by:
  - Environmental issues?
  - Organizational issues?
  - Motivational issues?
  - Lack of knowledge, skills or attitudes?
- What are the circumstances that cause you to say that things aren't at the desired state?
- Define your areas of dissatisfaction with the current situation?
- What is the impact of closing the gap or the need? What do you anticipate will be the result? How do you quantify or describe the benefit of closing the gap?
- What would happen if we did nothing?

The process of questioning stakeholders will allow a meeting manager to:

1. Identify and clarify the goal that the meeting intends to achieve
2. Identify and list behaviors associated with the goals of the meeting
3. Determine how the meeting goal supports the organization's mission, strategic direction, and other organizational initiatives
4. Describe precisely what the meeting participants will do to demonstrate goal achievement (These are preliminary tidbits for learning outcomes; see PMM5 Postscript™ Number 32 for more information on learning outcomes.)

5. Analyze whether this information is consistent
6. Analyze whether a meeting can realistically achieve the goal and desired challenges
7. Analyze alternatives to a meeting to determine if a meeting is the best fit

Solutions to “needs” do not always present themselves as either/or situations. Many times a combination of these solutions is necessary. Therefore, a meeting may be considered within the context of other solutions to achieve the desired results.

### Answer Unknown

The information gleaned from this initial line of questioning may not answer number 2, 6 or 7 from the list above. Consider the following examples:

**Example one:** Congress passes a law that requires certain information for compliance. The needs analysis determines very clearly that training is needed to close the gap between what employees now know what is needed for compliance. The needs analysis recommends a training meeting.

**Example two:** There is a sharp downward trend in sales in a lackluster economy. During the initial line of questioning, some people attribute this to a lack of training on new products. Others consider it a lack of understanding of how to overcome objections for the new products. Finally others consider it an issue of the compensation structure for the sales people.

In example two, the required solution is unknown. Will the downward trend in sales be solved by knowledge (training on new products), skill building (overcoming objections) or morale building (change attitudes about selling these new products)? Or is the solution found external to a meeting- in the overall economy or in the compensation structure?

This latter example identifies why meetings are only one solution. There are potentially six main causes of needs:

1. Lack of knowledge
2. Lack of skills
3. Inappropriate attitudes
4. Environmental
5. Organizational
6. Motivational

Additional questions are required to drill down to the underlying causes and potential solutions.

### More Questions

Meeting managers can rely on these and similar questions to better understand the needs if indications lead the meeting to believe there is a knowledge deficiency:

- Is this information embedded in existing internal resources (training)?
- Is this information available from other sources?
- Is this information readily accessible from external sources?

If indications lead the meeting manager to believe it is a skill deficiency, add these questions to the dialogue:

- Could people do it if really required to do it?
- Are present skills adequate for the desired performance?
- Can we provide some kind of job aid to boost the skill level?
- Would informal (such as on-the-job) training be sufficient?
- Can we deliver the needed information through means other than a meeting (in written instructions, checklists, internal memos, emails)?
- What unique skill building can our organization provide that is not otherwise available?

If it is a motivational issue, meeting managers can pursue this line of questioning:

- Does performing as desired matter to the employee?
- Is there a favorable outcome for performing?
- Can people take pride in performing as individuals or as members of a group?
- Are personal needs satisfied on the job?
- Is there an undesirable outcome for not performing?

If indications lead the meeting manager to believe it is managerial deficiency, they can pursue these questions:

- Are there motivation problems?
- Are there culture issues leading to the gap or need?
- Are there equipment problems?
- Are there policy problems?

If it is not a skill or knowledge issue, a meeting manager can probe along these lines:

- Are there disincentives for performing? What is the consequence of performing as desired? What is the form of punishment if one performs as expected?
- Do people perceive desired performance as being geared to penalties?
- Are there rewards for nonperforming? What is the result of doing it the present way instead of the desired way?
- What do people get out of the present performance in the way of reward, prestige, or status?
- Do people get more attention for misbehaving than for behaving?
- What supports (rewards) the present way of doing things? (Are we inadvertently rewarding undesirable behavior while overlooking the crucial behaviors?)

Are there obstacles to performing? If so, a meeting manager can use these questions:

- What prevents employees from performing?
- Do people know what is expected?
- Do people know when to do what is expected?
- Are there conflicting demands on people's time?
- Do people lack the:
  - Authority?
  - Time?
  - Tools?
- Are there restrictive policies, or a "right way of doing it," or a "way we've always done it" that ought to be changed?

- How can we reduce other competing demands (like phone calls, emergencies) that function as obstacles?

Is a meeting the solution? A meeting manager can ask these questions:

- Have all the potential solutions been identified?
- Do the solutions address one or more problems identified during the analysis (such as skill deficiency, knowledge deficiency, absence of potential, incorrect rewards, punishing consequences, distracting obstacles)?
- What is the cost of each potential solution?
- Have the intangible (not measured) costs been assessed?
- Which solutions are most practical, feasible, and economical?
- Which solution will add most value to (solve the largest part of the problem for the least effort)?
- Which remedy is likely to give us the most result for the least effort?
- Which solutions are we best equipped to try?
- Which solution interests us most? (Or, on the other side of the coin, which remedy is most visible to those who must be pleased)?
- Describe how and why a meeting is the optimal solution.

### Who are We Talking About?

Another huge element of a needs assessment is the audience for a meeting. Who is the intended and appropriate audience? The answer helps define the target population, target group, or target audience. The key learner-related characteristics are:

- Audience profile (age, gender and other demographic information)
- Audience preferences
- Prerequisite knowledge
- Existing skills
- Current attitudes

It must also be understood whether attendance is voluntary or compulsory.

### Needs Assessment Impacts Meeting Design

A needs assessment may identify the “blue sky” of needs and gaps. What can be solved or delivered in one meeting will be constrained by:

- **Culture** — organizational support, ability to change, values, beliefs, support for innovation
- **Resources** — time, funding and people

Needs assessment leads to what “could” be done. A needs assessment must be tempered by these two factors. A meeting does not occur in a vacuum nor can one meeting or conference change all the issues identified in a thorough needs assessment.

Assessment of culture and resources will ground the meeting in realism and allow the needs assessment to lay the groundwork for a meeting design. The needs assessment will help define:

- **Content** — what information is most relevant to the audience
- **Delivery environment** — how will information be delivered (lecture, written, video, etc.)?
- **Reinforcement strategies** — What is the call to action from the meeting, what follow-up will occur after the meeting to reinforce the meeting message, any actions needed to facilitate the application of information/skills/knowledge after the meeting

If this step is ignored there may be pushback during the meeting from management and attendees. Worse yet, participants may later experience much frustration if, when they return to their job settings, they are not allowed to apply what they learned because the environment (senior management, managers or co-workers, work loads, etc.) do not support the change.

## Evaluation

The needs assessment sets the stage for outcomes and also for evaluation. These are four possible purposes for performance measurement:

- **Participant reaction** — How did participants react to the meeting? Did they enjoy the experience? How do they value what they are learning?
- **Participant learning** — How well did participants learn? Are they able to transfer the meeting message to actual performance? Do they plan to change based upon attending the meeting?
- **On-the-job performance change** — How much change is evident on the job, based on what participants have learned? How well has the learning transferred from the instructional stage to the work performance environment?
- **Organizational impact** — How has the organization been affected by the results of the meeting?
- **Return on investment** — Based upon the investment in the meeting (all costs), was the business impact positive and did it outweigh (or equal) the costs?

This evaluation process is described in *Professional Meeting Management*®, fifth edition in Chapters 2, 45 and 46.

## Summary

Needs assessment forms the foundation of a meeting's marketing, design, delivery and evaluation. In some situations needs assessments are formal written processes that are used to ascertain the needs and gaps in an organization. Meeting managers can use these needs assessments to design meetings. In the absence of formal assessments, meeting managers must participate in a dialogue with stakeholders to discover the needed information that clearly articulates the goals, desired changes and outcomes from the meeting. PMM5 Postscript Number 2 is a resource for several key questions for meeting managers.

### Group Discussion or Projects

1. What is easier to change through a meeting- behavior, knowledge or attitudes? Why?
2. How can an association reconcile differing “needs as identified by members during a formal needs assessment?
3. As a meeting manager, what steps of a needs assessment are you interested in having input in?
4. What methods can be used to conduct a formal needs assessment?
5. How can a meeting address knowledge needs besides scheduling sessions on a specific topic?
6. What questions would you include on a needs assessment about content delivery options and preferences?
7. What preferences do you feel it is important for a meeting manager to know about the target audience? For corporate meetings? For association meetings?

### References

1. Mager, R. and Pip, P. (1984). *Analyzing Performance problems* (2<sup>nd</sup> ed.). Belmont, CA: Lake Publishing Company.
2. Myhill, M & Phillips, J. (2005). Starting with the End in Mind. In G. Ramsborg (Ed.), *Professional Meeting Management* (5th ed.) pp. 17-28. Dubuque, Iowa: Kendall/Hunt Publishing Company.
3. Ramsborg, G. (2002). Process of conducting a needs assessment. *E-topics newsletter*.

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