

# Needs Assessment Final Project Plan

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## *Executive Summary*

The needs assessment takes place in an independent retailer and examines the performance problem of below-quota sales for one genre of books, bestsellers. After defining the performance problem, the next step in the needs assessment was to work with sales staff and collect data. Data collection consisted of one-on-one interviews, online surveys, and observations.

The problem is currently being analyzed through the framework of the Performance Pyramid (Wedman & Graham 2004). This framework offers a system of performance support elements which are interdependent. The premise of the Performance Pyramid states that if all elements are not in alignment, performance suffers.

The needs assessment final report will distill work conducted over the course of three months on the question of why bestsellers' sales are not meeting the quota. It will summarize the data in relationship to the Performance Pyramid elements. The final report will offer recommendations for improving sales.

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## *Context of Performance Problem*

The workplace used for this assessment is a single, stand-alone retail store which sells clothing, music, gifts, and books. The workplace is a for-profit environment. The total staff for the store is about 50 employees; in the book section, there are six sales staff members, one buyer, one supervisor, and one manager. For the store as a whole and for the book section overall, the financial picture has been positive.

The assessment involves only the book section and specifically deals with the sales of bestsellers. There has been some turnover in the book section sales staff within the last year.

The optimal sales quota is defined as exceeding the sales of the same month from a year before, specifically 5% above the previous year's sales. For example, optimal sales for September 2006 would be 5% higher than sales for September 2005. Quotas must be consistently met so the store's financial health can continue.

For the first nine months of this year, January – September 2006, sales of bestsellers have been below the level of sales from the previous year. The assessment explores possible causes for the drop in sales of bestsellers.

### *Work Plan*

The needs assessment is being conducted using the Performance Pyramid model as the organizing framework. The process begins with defining the performance problem, then seeks to understand the problem's context through data collection and analysis, and ends with a needs assessment report which describes the findings and offers recommendations.

The performance problem for this needs assessment has been defined. Primary data has been collected from interviews, surveys and observations. Two one-on-one interviews were conducted using a detailed 32-question protocol. Nine participants were invited to take a seven-question online survey; six responses were returned. Two one-hour observations were conducted using a two-page observation guide.

The data from all collection sources is being analyzed using both qualitative and quantitative methods. Data will be categorized into Performance Pyramid elements. Results will be summarized in the final report which is described below in the Deliverables section. The final report will be presented to the department manager in a face-to-face meeting.

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### *Deliverables*

The needs assessment will produce a written report with an executive summary and data-driven recommendations. This report will describe the performance problem, the organization, and the audience who was assessed. Details in the report will include data sources, data gathering techniques, a data table, and data analysis. Data gathering instruments will be included in the appendix.

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### *Timeline*

The timeline for this needs assessment occurs from September through December. It started in September with the tasks of defining the performance problem and researching secondary data. One-on-one interviews and observations were conducted in October. The online survey was conducted during October and the first week of November.

Further analysis of the data and a draft of the report will be completed by December 4. If necessary, the timeline will be adjusted to accommodate changes in project scope and barriers to needs assessment data. It is expected that the report will be finalized and ready for delivery by December 11.

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