

Training Needs Analysis

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Client: Central County School District

Date: 6/8/2025

Subject Area

Microsoft Excel Basic Functions

The Client plans to implement a Microsoft Excel-based Student Information System (SIS), migrating from a paper-only filing system. It is assumed that a 3rd party contractor will be developing the new SIS, therefore existing employees will be required to reference data, navigate spreadsheets, and utilize only the basic functions of Excel, specifically as it relates to data entry. It is unknown if the employees will be responsible for data migration from paper filing system (This is not recommended due to the added risk of clerical errors).

Subject Matter Expert(s) – (SME)

Emma Chieppor, Founder: Excel Dictionary

Target Audience

Statistically, the target audience is: School district administrative staff, 50+ years old, mix of Bachelor's Degree, Associates Degree and High School education (US BLS, 2025)(US Data, 2026). More research on employees is needed to refine the specifics of target audience.

Desired State

1. Basic Excel navigation and data entry: Tables, filter/sort, keyboard shortcuts
2. Personally Identifiable Information (PII) security in a digital storage environment

Employees will be proficient in entering and editing data in the Client's new SIS, increasing productivity and decreasing clerical errors. They will also be able to quickly and efficiently retrieve stored information on demand, resulting in a better customer service experience. Admin staff will be trained on policies and procedures designed to safeguard sensitive digital information, reducing the chances of privacy violations that could result in legal action.

Current State

"The digital divide is a great and serious challenge to modern society, especially since most older adults lack either technology or the skills needed to navigate the digital landscape" (Siguencia, 2025, pg. 7).

Employees have little or no experience with digital data storage, Microsoft Excel, or digital security. This lack of experience will result in data entry errors, employee stress/dissatisfaction, wasted time, and possibly legal action due to mishandling of sensitive information. They do understand recordkeeping and the importance of safeguarding sensitive information in paper filing systems, so the developed training should connect existing knowledge to its digital counterpart as much as possible.

Instruments/Analysis Methods

The two primary methods of analysis are: Anonymous Email or Online Survey/Questionnaire, Focus Group

Rationale: A questionnaire can provide a general estimate of employee skills/abilities. The drawback is that self-assessment is not always an accurate representation of a person's skill, and some employees do not like to participate in electronic surveys. A focus group chosen by supervisors, with the specific intent of achieving a true cross-section of employees, will help refine the information gained from the questionnaire. A combination of these two methods should result in a more detailed description of the current state of employee skills and abilities (Phillips, 2010, Ch. 1).

References

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Phillips, P. (2010). *ASTD Handbook of measuring and evaluating training*. ASTD Press

Siguencia, L. (2025). Bridging the digital divide: Leveraging social media for enhanced corporate learning and digital literacy among older adults. *International Journal of Advanced Corporate Learning*, 18(3) <https://research.ebsco.com/c/i7rmx5/viewer/pdf/lpzs7jyji>

US Bureau of Labor Statistics (January 29, 2025). *Labor force statistics from the current population survey*. <https://www.bls.gov/cps/cpsaat11b.htm>