

Summit credit union case study essay sample



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Introduction

The idea of the needs assessment is to locate the actual solution to a problem within an organization. Some may result in new training exercises, where others may simply need another suggested solution. The needs assessment is designed to look for the particular need for training. This assessment involves several steps consisting of organizational analysis, person analysis, and then task analysis. The breakdown of each category allows for a company's strategy to be picked apart and looked at in depth. Once it has been examined then possible solutions can be implemented along with whom specifically requires further training depending on the questions that have risen. Conducting a Needs Assessment

As stated in the case study, often the new lenders are brought on and only knowing about the types of loans and how the lending system works, however they begin their job without the training in particular aspects of the job that should be known prior to beginning their position. Training in lending guidelines and underwriting are going to increase their job skills and strengthen their contribution to the company along with their team. If they also wait for sales skill training then they will not be as familiar with products offered and how to help them be addressed to the customers. When a lender cannot offer the correct products to the customers then they will go to a competitor, losing them valued business that could have brought in further referrals. During this assessment particular questions may be asked that can help determine if further assessment steps will be required. Is Training the Problem?

To determine if training may be the problem, both management levels would want to look into the results of the Needs Assessment. Problems involving performance would rely on the characteristics of the employee that will be performing the tasks, input and output, the consequences and the feedback which can be critical to shaping behavior. In this case study the issue at hand is that these new employees would be lacking the training necessary to adequately do their jobs. New staffs are lacking the knowledge to perform at peak expectations. The Summit Credit Union would find in its best interest to train their loan staff in all aspects of their job prior to having them enter the work environment and deal with customers. The new hires are traditionally being trained in the basic requirements but a few extra days with the rest of the information would be able to save time and money for the company and those being trained. Who Gets Involved During the Assessment?

During a needs assessment a person would want to involve the employees as well as managers and trainers. Each of these groups will be affected by the results of the assessment and should be responsible for certain portions of what the assessment is looking to find and improve upon. The results of the assessment the trainers would be asking questions in reference to the effectiveness to further training the Summit Credit Union employees. Mid-level and upper-level managers would also be asking questions and showing involvement since it could directly affect their profits and any budgetary issues they could already be dealing with. The upper-level managers would be the final stop in the needs assessment because they can determine if the

training would fit into the company's strategy and they control the financial ability to provide training materials to the trainers.

References

Noe, R. (2012). Employee training & development. (6th ed.). New York, New York: McGraw-Hill/Irwin.