

# Training Needs Analysis Form

*Employee Name*

*Job Title*

*Date of Analysis*

## Ability Levels:

**Unique (U):** This is what I'm best at; very confident at doing this; I do this extremely well

**High (H):** I love doing this; I'm confident about it; I'm well equipped with skills and knowledge

**Medium (M):** I'm not the world's best at doing this but I'm doing okay; I could maybe do with a bit more training

**Low (L):** I know I have to do this but don't enjoy it; I'm slightly out of my depth; at times I feel ineffective; I have hardly any knowledge on this

## General:

<i>Abilities</i>	<i>Relevant to Your Job</i>		<i>Skill Level:</i>			
	<i>Yes</i>	<i>No</i>	<i>U</i>	<i>H</i>	<i>M</i>	<i>L</i>
Meeting deadlines						
Prioritising workload						
Multitasking						
Working by myself						
Teamwork						
Self-motivation						
Relationship building and interpersonal skills						
Confidence in own abilities						
Ability to follow procedures						
Listening skills						
Verbal communication skills						
Written communication skills						
Attention to detail						
Learning skills						
Planning and project management						
Time management						

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## Training Needs Analysis Form *(continued)*

### Office Related

<i>Abilities</i>	<i>Relevant to Your Job</i>		<i>Skill Level:</i>			
	<i>Yes</i>	<i>No</i>	<i>U</i>	<i>H</i>	<i>M</i>	<i>L</i>
Client File management						
Letter or report writing						
Spelling and grammar						
Use of Outlook						
Use of Word						
Use of Excel						
Use of Access						
Use of PowerPoint						
Use of Back Office System(s)						
Basic IT skills						
Process and procedures creation						
Internal meetings - co-ordinating and running						
Seminar/event organisation						
Database management						

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# Training Needs Analysis Form *(continued)*

## Technical

<i>Area of Technical Knowledge</i>	<i>Area of Technical Knowledge</i>	<i>Relevant to Your Job</i>		<i>Skill Level:</i>			
		<i>Yes</i>	<i>No</i>	<i>U</i>	<i>H</i>	<i>M</i>	<i>L</i>
Retirement Planning	Personal Pensions						
	Group Personal Pensions						
	Specialised pension (eg. SSAS, SIPP)						
	Income Drawdown						
	Pension Transfers						
	Occupational Schemes						
	AVCs and FSAVCs						
	Annuities						
Investments	National Savings						
	Fixed Interest Securities						
	Investment Bonds						
	Individual Savings Accounts						
	Unit Trusts and OEICS						
	Investment Trusts						
	Venture Capital Trusts						
	Enterprise Investment Schemes						
	Hedge Funds						
	Structured Products						
	Unregulated Collective Investment Schemes						
	Equities						
	Offshore Investments						
	Property Investments						
Ethical Investments							
Protection	Life Assurance						
	Critical Illness						
	Income Protection (PI)						
	Private Medical Insurance						

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# Training Needs Analysis Form *(continued)*

## Technical

<i>Abilities</i>	<i>Relevant to Your Job</i>		<i>Skill Level:</i>			
	<i>Yes</i>	<i>No</i>	<i>U</i>	<i>H</i>	<i>M</i>	<i>L</i>
Tax planning						
Cash Flow planning						
Getting to know your client using 'soft questioning' techniques						
Technical calculations						
Investment Philosophy						
Gathering client data						
Research and analysis						
Plan/Findings presentation						
New business processing						
Annual reviews						
General understanding of Financial services						
Research systems						
Writing of reports and recommendation letters						
Financials - reporting						
Treating Customers Fairly (TCF)						
FCA regulation, Principles and Codes of Business (COBs)						
Money laundering prevention						
Group scheme administration						
Compliance management						
Compliance with Data protection: Data Protection Act 1998 - confidentiality of information						
Complaints handling / Financial Ombudsman service						
Breaches and notifiable events handling						

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## Training Needs Analysis Form *(continued)*

### Management

<i>Abilities</i>	<i>Relevant to Your Job</i>		<i>Skill Level:</i>			
	<i>Yes</i>	<i>No</i>	<i>U</i>	<i>H</i>	<i>M</i>	<i>L</i>
Business planning & development						
Management information reporting						
Team management						
Team coaching						
Delegation						
Motivation of others						
Leadership						
Business management						
Financial forecasting & budgeting						

### Sales & Marketing

<i>Abilities</i>	<i>Relevant to Your Job</i>		<i>Skill Level:</i>			
	<i>Yes</i>	<i>No</i>	<i>U</i>	<i>H</i>	<i>M</i>	<i>L</i>
Networking						
Establishing & maintaining relationships with professional connections						
Opportunity identification						
Referral management						
Marketing campaigns						
Writing of marketing materials						
Writing of articles & blogs						
Presentation skills						
Sales skills						
PR skills						
Marketing promotions						
Events organisation						

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