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SAMPLE OUTPUT

NEEDS ASSESSMENT REPORT

Workforce Capability Assessment

A structured needs assessment of technical capability across a 340-person operations group.

POPULATION

340 staff

METHOD

**Survey, interviews,
task audit**

GAPS IDENTIFIED

6 priority

STATUS

Sample output

Purpose and Scope

This assessment establishes where capability in the operations group falls short of what current and planned work requires, how large each gap is, and which gaps are worth closing with training rather than with hiring, tooling or process change. It covers 340 staff across four functions and draws on a capability survey, 22 structured interviews and a task-level audit of eleven core workflows.

Method

- Capability survey: 340 invited, 287 completed (84%), self-assessment against a defined five-level scale.
- Structured interviews: 22 participants across all four functions and three seniority bands.
- Task audit: eleven workflows observed end to end, with time and error data captured.
- Triangulation rule: a gap is only reported where at least two of the three methods agree.

Priority Gaps

Gap	Population affected	Severity	Best intervention
Data quality handling	148	High	Training + tooling
Exception escalation judgement	96	High	Training + process
Reporting and query skills	212	Medium	Training
Vendor system configuration	34	High	Hire or contract
Customer written communication	180	Medium	Training
Regulatory record-keeping	61	Medium	Process + checklist

IMPORTANT DISTINCTION

Two of the six gaps should not be addressed with training. Vendor system configuration is a specialist capability that 34 people will not retain, and regulatory record-keeping fails because the process has no checkpoint — not because staff lack knowledge.

Gap Detail

Data quality handling

The task audit found that 31% of downstream errors originate in three specific judgement points where staff must decide whether a record is usable. Interviews confirmed that no shared standard exists; each team has developed its own. This is the highest-value gap in the assessment because the

error cost is measurable and the remedy is inexpensive.

Exception escalation judgement

Staff escalate either too early or not at all, and the survey shows why: 68% could not state the escalation threshold for their own workflow. The gap is knowledge of a specific rule set, which makes it well suited to short scenario-based training rather than a course.

Recommended Programme

Phase	Focus	Population	Duration
1	Data quality standard + scenarios	148	4 weeks
2	Escalation judgement workshops	96	3 weeks
3	Reporting and query fundamentals	212	6 weeks
4	Written communication clinics	180	Ongoing, quarterly

Measurement Plan

- Downstream error rate at the three audited judgement points — primary measure for Phase 1.
- Escalation timeliness against the published threshold — primary measure for Phase 2.
- Report self-service rate versus requests to the analytics team — Phase 3.
- Re-run the capability survey at six months using identical wording.

What This Assessment Could Not Determine

The task audit did not cover the two seasonal workflows that run outside the assessment window, and no data was available on contractor capability. Both should be assessed before the programme is extended beyond the four phases above.

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