A close up of a logo

Description automatically generated

**Needs Assessment Questionnaire   
for Employees**

Pinpoint employee training needs with a needs assessment questionnaire. Use this easy-to-use template to create a custom needs assessment survey for your organization.

**The Takeaways:**

* Customize a needs assessment template to suit your company.
* Compare employee skill levels with position needs to identify gaps to address   
  via training.
* Gain insights to help develop strategically aligned workplace training initiatives.

**Instructions:**

Use this template to customize a needs assessment questionnaire specific to your organization. Insert applicable information to replace text within brackets and adjust questionnaire sections and items, adding and/or deleting as needed. Copy and paste the sections and/or items you want to use into your company’s letterhead or into an online questionnaire app.

**Best Practices to Consider:**

When customizing the survey to meet your needs, consider whether the following best practices are applicable to your organization.

**MULTIPLE VERSIONS BY JOB TYPE**A needs assessment questionnaire should be specifically focused on identifying employee skills for the purpose of determining training needs. Because required skills can vary significantly, you may find it helpful to create a few different versions of this survey. Once you perfect a basic needs assessment questionnaire covering core competencies for most jobs, consider using that version as a starting point to create position-specific versions. For example, you may find it beneficial to create versions specific to roles such as management, administrative, customer service, and sales roles.

**CONFIDENTIALITY/ANONYMITY CONSIDERATIONS**Consider if your employees may be hesitant to answer truthfully if the needs assessment is not anonymous and/or if their responses will be provided to their manager individually or will impact their performance evaluations. If this is an issue with your team, you may want to consider making the survey anonymous or only reporting survey results to managers in summary form. Sample language to consider for the introduction is included below in brackets.

**Needs Assessment Questionnaire   
for Employees**

Thank you for completing this needs assessment questionnaire. This information is being requested to help [INSERT COMPANY NAME] better meet employee training needs. Your honest feedback is greatly appreciated.

You are encouraged to include your name, department, and position, but are not required to do so. [Results will only be reported to managers in summary form.] [Individual responses will not be provided to managers or placed in personnel files.]

**Name (optional): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Position (optional): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Department (optional): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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| **Computer Skills** | | | |
| **SKILL** | **CURRENT PROFICIENCY LEVEL** | **PROFICIENCY NEEDED FOR CURRENT JOB** | **TRAINING DESIRED?** |
| **Excel** | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** Yes **[ ]** No |
| **Word** | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** Yes **[ ]** No |
| **Outlook** | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** Yes **[ ]** No |
| **PowerPoint** | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** Yes **[ ]** No |
| **Access** | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** Yes **[ ]** No |
| **Windows** | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** Yes **[ ]** No |
| **[Company Specific System/Platform]** | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** Yes **[ ]** No |
| **[Other/Specify]** | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** Yes **[ ]** No |

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| **Collaboration Tools/Social Media Platforms** | | | |
| **SKILL** | **CURRENT PROFICIENCY LEVEL** | **PROFICIENCY NEEDED FOR CURRENT JOB** | **TRAINING DESIRED?** |
| **LinkedIn** | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** Yes **[ ]** No |
| **Slack** | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** Yes **[ ]** No |
| **Zoom** | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** Yes **[ ]** No |
| **Company Intranet** | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** Yes **[ ]** No |
| **[Other/Specify]** | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** Yes **[ ]** No |

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| **General Business Skills** | | | |
| **SKILL** | **CURRENT PROFICIENCY LEVEL** | **PROFICIENCY NEEDED FOR CURRENT JOB** | **TRAINING DESIRED?** |
| **Time Management** | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** Yes **[ ]** No |
| **Typing** | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** Yes **[ ]** No |
| **Business Writing** | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** Yes **[ ]** No |
| **Proofreading** | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** Yes **[ ]** No |
| **Recordkeeping** | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** Yes **[ ]** No |
| **Data Analysis** | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** Yes **[ ]** No |
| **Telephone System Operation** | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** Yes **[ ]** No |
| **[Specify Type of Office Equipment] Operation** | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** Yes **[ ]** No |
| **[Other/Specify]** | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** Yes **[ ]** No |

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| **Interpersonal Skills** | | | |
| **SKILL** | **CURRENT PROFICIENCY LEVEL** | **PROFICIENCY NEEDED FOR CURRENT JOB** | **TRAINING DESIRED?** |
| **Conflict Management** | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Yes **[ ]** No |
| **Public Speaking** | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Yes **[ ]** No |
| **Effective Communication** | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Yes **[ ]** No |
| **Customer Service** | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Yes **[ ]** No |
| **Negotiation** | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Yes **[ ]** No |
| **Emotional Intelligence** | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Yes **[ ]** No |
| **Effective Listening** | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Yes **[ ]** No |
| **[Other/Specify]** | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Yes **[ ]** No |

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| **Management/Supervision Skills/Knowledge** | | | |
| **SKILL** | **CURRENT PROFICIENCY LEVEL** | **PROFICIENCY NEEDED FOR CURRENT JOB** | **TRAINING DESIRED?** |
| **Effective Supervision** | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Yes **[ ]** No |
| **Leadership Essentials** | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Yes **[ ]** No |
| **Effective Employee Feedback** | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Yes **[ ]** No |
| **Performance Management** | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Yes **[ ]** No |
| **Coaching/ Mentoring** | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Yes **[ ]** No |
| **Interviewing** | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Yes **[ ]** No |
| **Employment Law** | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Yes **[ ]** No |
| **Managerial Decision-Making** | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Yes **[ ]** No |
| **[Other/Specify]** | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Yes **[ ]** No |

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| **Leadership/Navigation Skills/Knowledge** | | | |
| **SKILL** | **CURRENT PROFICIENCY LEVEL** | **PROFICIENCY NEEDED FOR CURRENT JOB** | **TRAINING DESIRED?** |
| **Strategic Planning** | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Yes **[ ]** No |
| **Strategic Management** | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Yes **[ ]** No |
| **Agile Leadership** | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Yes **[ ]** No |
| **Corporate Finance** | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Yes **[ ]** No |
| **Budget Management** | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Yes **[ ]** No |
| **Risk Management** | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Yes **[ ]** No |
| **[Other/Specify]** | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Yes **[ ]** No |

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| **Sales Skills** | | | |
| **SKILL** | **CURRENT PROFICIENCY LEVEL** | **PROFICIENCY NEEDED FOR CURRENT JOB** | **TRAINING DESIRED?** |
| **Prospecting** | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Yes **[ ]** No |
| **Cold Calling** | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Yes **[ ]** No |
| **Proposal Writing** | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Yes **[ ]** No |
| **Marketing Communications** | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Yes **[ ]** No |
| **[Other/Specify]** | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced | **[ ]** Yes **[ ]** No |

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| **Production Skills/Knowledge [Adapt to Specific Jobs]** | | | |
| **SKILL** | **CURRENT PROFICIENCY LEVEL** | **PROFICIENCY NEEDED FOR CURRENT JOB** | **TRAINING DESIRED?** |
| **Safety Procedures** | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** Yes **[ ]** No |
| **Effective PPE Usage** | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** Yes **[ ]** No |
| **[Specify Equipment] Operation** | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** Yes **[ ]** No |
| **[Specify Procedure]** | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** Yes **[ ]** No |
| **[Company Specific Systems/Platforms]** | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** Yes **[ ]** No |
| **[Other/Specify]** | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** None  **[ ]** Basic  **[ ]** Intermediate  **[ ]** Advanced  **[ ]** Expert | **[ ]** Yes **[ ]** No |

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| **Additional Training Needs** | | |
| **Are there additional training topics  that would benefit you in your job?** | **[ ]** Yes **[ ]** No | **If yes, please specify:** |
| **Are there industry standard  certifications or credentials that  would benefit you in your job?** | **[ ]** Yes **[ ]** No | **If yes, please specify:** |
| **Please add any additional  information or requests related to  training that you’d like to share.** |  | |