



FREDRICKSON
L E A R N I N G

Business Initiative Questionnaire

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Business Initiative Questionnaire

Business Goals

1. What are the business goals of the initiative?
2. Are the business goals quantifiable? If yes, how?
 - If yes, go to question 3.
 - If no, go to the next section below.
3. What current (or planned) business measurements will be used?
4. What is the current baseline for these numbers?
5. What is the change in results business results goal to be considered a success?

Procedures and Skills

For each business goal, answer the questions below.

6. What procedures or skills will they need to gain for the organization to meet the business goal?
7. Who will be responsible for completing the procedures or skills?
8. What is the confidence level that completing the procedures or skills will result in achieving the business goals? Rate on a 10-point scale with 1 as low and 10 as high.
9. Which procedures or skills are new or difficult?
10. What potential issues besides learning the procedures and skills will affect the ability of the employees to complete the procedures or skills?
11. How many times or what duration will an employee likely need to complete procedures or skills before they become habitual?

Implementation, Accountability, and Measurement

12. Do the business goals warrant developing an implementation plan to drive and/or measure the associated initiative outcomes?
 - If yes, go to question 13.
 - If no, end.
13. Who is accountable to ensure the appropriate procedures and skills take place on the job?
14. How will we know whether employees are completing the new procedures and/or new skills on the job?
15. How can or should we support the procedures and skills in the flow of work?
 - Digital support and job aids?
 - Coaching and mentoring?
 - Other?
16. Is there an existing procedure that is already in place in flow of work/on-the-job, that we could build on to support the procedures and skills approach we defined in 16?
17. If we are using coaching or mentoring, would the coaching and mentoring process benefit from a review checklist that defines the procedures and/or skill?
18. Do we need a plan if the procedures and skills are not demonstrated on the job?

Business Initiative Checklist

Use the information gathered from the Business Initiative Questionnaire to complete the checklist below. Put an X in the appropriate column for each item.

Business Goals	Yes	No	NA	Comments
Identified				
Quantifiable				
Currently measured				
Plan to measure				
High level of confidence that we'll meet or exceed our business goals				
Procedures and Skills related to the Business Goals				
Identified.				
Logical relationship to the business goals				
We can identify the employees who are responsible for completing the procedures and/or skills?				
Factors other than learning will affect the ability to meet the business goals				
Procedure and skills are new and/or difficult				
Employees will need time and practice to become proficient.				
Implementation, Accountability, and Measurement				
The business goals warrant an implementation plan to drive and/or measure success?				
We can identify the employees who will be accountable to ensure the procedures and skills are completed on the job?				
We can determine if the procedures and skills are completed on the job?				
There are opportunities to support the performance of procedures and skills in the workflow?				
The procedures and skills coaching and mentoring would benefit from a review checklist to support the coach and measure performance?				
We have a plan to handle situations when the appropriate procedures and skills are not completed on the job?				