

Solve the Right Problem.

Before You Approve Training

Is the Problem Trainable?

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A team misses its service targets. The proposed response is a refresher course.

Before approving it, ask what employees would do differently after the course, and whether they could do it under today's working conditions. If the answer depends on fixing access, changing an approval process or resolving conflicting priorities, those dependencies belong in the investment decision. Otherwise, the organisation may fund learning while leaving the performance barrier in place.

Training is a reasonable response when a meaningful gap in knowledge, skill or judgment contributes to the problem, and people have a credible opportunity to use what they learn. That requires more evidence than a missed target or a manager's request.

Start with two questions:

Would better execution of this task materially improve the result?

What would still prevent that execution if employees had the required capability?

The first question tests whether the proposed behaviour matters. The second exposes conditions that training alone cannot resolve. Neither question, by itself, proves that training is needed.

Define the performance before choosing the solution

"Improve customer service" is too broad to guide an investment.

"Resolve an eligible refund during the first customer contact, using the correct policy and approval route" gives you something to examine. You can observe the task, inspect the decision and identify where it breaks down.

Write down the expected performance, the current gap and the consequence. Then look for evidence from actual work: case records, errors, observation, system access and employee explanations. A request for training is a starting hypothesis.

This is consistent with CIPD's guidance that learning needs analysis should connect capability requirements with organisational needs and performance.

Separate a capability gap from a barrier to using capability

Ask employees to demonstrate the task under realistic conditions. A person who can explain a policy may still struggle to apply it to an ambiguous case. Conversely, someone who handles a practice case correctly may be blocked at work by permissions or an unavailable approver.

Compare successful and unsuccessful cases carefully. Experienced employees may have extra access, informal support or easier assignments. Their results do not automatically prove that everyone else needs training.

COM-B, developed by Susan Michie, Maartje van Stralen and Robert West, offers a useful lens: behaviour depends on capability, opportunity and motivation. It helps keep the diagnosis broader than what an employee knows. The model does not validate this article's decision table or guarantee that a particular intervention will work.

Make the approval decision explicit

Use the following table as a practical discussion guide. It is a synthesis of performance-diagnosis principles, not a validated scoring instrument.

Decision	When it fits	What to do next
Proceed	Evidence identifies a relevant capability gap, and conditions support applying the learning	Choose focused practice or learning support; define the performance check and owner
Fix	Access, workflow, expectations or reinforcement materially blocks the required performance	Assign the barrier to someone with authority to resolve it; reassess any remaining capability gap
Defer	The request may be justified, but the evidence or a critical dependency is unresolved	Specify the missing evidence, responsible person and review date
Stop	The proposed training has no credible connection to the result, duplicates an adequate response or lacks a justified purpose	Close the training proposal and record the reason; route any unresolved operational problem to its owner

Mixed causes require a combined response. A system repair and targeted practice may both be necessary. Where practical, prepare them in parallel, with a clear dependency before rollout.

“Fix” and “defer” must come with ownership. They should not become ways to leave a request unanswered.

A refund problem that needs two responses

The following example is illustrative. It is not a client case or a report of measured results.

A service leader requests a refresher course because refund cases keep escalating.

In this hypothetical review, observation reveals two patterns. Some employees cannot distinguish between standard refunds and exceptions. Others make the correct decision but lack permission to complete the refund. A broad refresher would address only part of the problem.

The proposed response has two owners. Operations clarifies the approval route and resolves the access barrier. L&D; develops short case practice for employees who need help identifying exceptions, supported by a maintained decision guide.

Before rollout, the team records the current escalation pattern and agrees how to check both decision accuracy and avoidable escalations. It also monitors inappropriate refunds so that reducing escalations does not create a different problem.

If results improve after both changes, the team should describe the combined intervention and examine other changes during the period. It should not attribute the entire improvement to the learning component.

Keep the investigation proportionate

A straightforward task with an observed skill gap may need a brief conversation and demonstration. A costly enterprise programme warrants more scrutiny because the commitment includes employee time, manager support, maintenance and implementation dependencies.

The strongest objection to diagnosis is delay. Address it by collecting the smallest amount of evidence that could change the decision. If nobody can say how another interview or survey would affect the recommendation, reconsider whether it is necessary.

Required training needs a separate check. This guide does not determine whether an obligation applies or authorise its cancellation. Confirm the requirement with the accountable owner, then diagnose what else is needed for reliable performance.

Give the sponsor a decision they can act on

An approval brief should state the performance to improve, the evidence supporting the proposed response, the barriers that must be addressed and the people accountable for them. Include the full time commitment and how you will judge whether the response helped.

The sponsor should also know what would cause you to revise the recommendation. For example, if employees perform accurately once access is restored, the case for broad retraining becomes weaker.

Before approving your next training request, complete the decision worksheet below with the operational owner.

Reusable Decision Worksheet

Use one worksheet for a specific performance problem. Record uncertainty rather than filling gaps with guesses.

01	What result needs to improve, and why does it matter?	
02	What must people do differently, in which situation and to what standard?	
03	What evidence shows the current gap? Include source and date.	
04	Why do we expect that change in performance to improve the result?	
05	What evidence indicates a knowledge, skill or judgment gap?	
06	What would still block a fully capable employee?	
07	What other explanation could account for the problem?	
08	What is the smallest credible response, including any non-learning changes?	
09	Decision: proceed, fix, defer or stop? Explain the reason.	
10	Who owns the response and each dependency?	
11	What time, cost and operational capacity does the response require?	
12	What baseline, performance measure and unintended consequence will we monitor?	
13	When will we review the result, and what evidence would change the decision?	

Decision date: _____ Operational owner: _____ L&D; partner: _____

References (checked 10 September 2026): CIPD — Learning needs analysis (cipd.org/en/knowledge/factsheets/learning-needs-factsheet/); Michie, van Stralen and West, 2011 — COM-B (link.springer.com/article/10.1186/1748-5908-6-42). They support the cited underlying principles, not the efficacy of this particular worksheet. The remaining decision guidance is professional synthesis.