



# Why (and how) you should regularly perform a needs assessment



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In my experience, relatively few organizations consistently and formally assess their changing information needs. Granted, there are many valid reasons why you may postpone a needs assessment, or consider that it isn't urgent. It isn't a quick or straightforward task, after all.

But a regular needs assessment is a must – it's essential to keeping services aligned with needs and provides a baseline to support budget and procurement negotiations.

And in my view, there are a few points that make a needs assessment a more urgent problem than it used to be. Post-pandemic hybrid working habits is one reason, but the new and unique ways in which organizational IT can now ingest and integrate external information sources is another key reason.

In this article, I'll outline why I think that you need to consider a regular, deep review of your information needs and information partners alongside a few ideas on how you can conduct that review.

## The Case for a needs assessment

You already know that your organization's information needs are continuously changing and that you need to regularly re-assess those needs to ensure your resources match and, of course, that's your starting point.

Yes, monitoring and analytics help match needs to resources on an ongoing basis, but some needs will only be fully explored through a more in-depth investigation – usage will show one viewpoint, but interviewing associates will help uncover blind spots. That includes problems that obstruct how well information sources serve their purpose – such as ease of use and accessibility as well as supplier relationships.

There are a few other points you need to think about. For example, was a clear, effective needs assessment ever performed in the first instance? Perhaps the sources in place were never that well suited, only to become even less fitting over time.

Also consider the *resource market*. You may know that you need X, Y, and Z – and you may have long-standing vendors offering an adequate service. But what else has become available since you last evaluated vendors? Is there a better-suited or more cost-effective resource out there?

I'd also suggest that regular, thorough needs assessments tie closely into your ability to maintain and grow your information services budget. A clear needs assessment is a concrete way to back up procurement requirements.

## Approach and goals

Start your needs assessment by zooming out. A literal, narrow focus on day-to-day information needs can mean that you miss the bigger picture. Instead, approach a needs assessment from a *business needs* point of view.

Aim for a deeper discussion that starts with your business environment, moving on to considering what your *customers* or clients need. Consider your business direction, including the markets or verticals you are exploring in the medium to long term – and what you need to know about those markets.

What do you want to achieve? In the main, you want to close the gap between information needs and both the resources available and the resources that are accessed. That takes into account clear current needs, but also needs that lie around the corner, reflecting your medium and long-term business goals.

Ultimately, you want to optimize spending to deliver the most value for information consumers, so you also need to assess for duplication. Delivering maximum value also implies arguing for maximum budgets – and your needs assessment will give you the evidence to argue for that budget.

## Ask the right questions

Getting real transparency on information needs requires persistence and diplomacy, and it's something you'll achieve better through interviews rather than relying on a dry email questionnaire. A group workshop is something you should think about.

An effective, successful assessment really depends on asking the right questions, and some of the points I'd suggest you try to cover include:

- **Cataloging questions:** Common-sense questions that map out needs, such as asking what types of analyses and research your associates need to do to perform in their roles, and what they need to succeed.
- **Focus on change:** Question whether there were any clear signs of changing needs because of changes in business direction, changes in client mix, a staff change, or something else – and whether anything keeps your colleagues up at night.
- **Look for inefficiencies:** Work to identify the most inefficient elements around interacting with existing sources-- including points around accessibility, sign-in,

the fit of the source, and so forth.

- **Examine supplier relationships:** Try to gauge the health of supplier relationships, particularly where the complexity of information sources requires regular interactions. Check with your team to see whether suppliers are being fully supportive.
- **Survey resources:** Consider issuing an RFI or RFP to draw some information from competing vendors so that you can catch any changes in the landscape. There may well be more capable, more suited sources in the market.
- **Wish list:** Finally, aim for a very open conversation about “what’s possible”, and encourage your colleagues to put forward a wish list that, even if you’re unable to meet in full right away, may provide some clues.
- If all the above sounds quite exhaustive and time-intensive, , frankly, I would agree -- but I would also say it’s absolutely worth your while to make a real effort to establish a regular, intensive needs assessment process that digs deep.

## What you'll achieve

Step through a needs assessment process and you'll ensure that real, on-the-ground information needs are met. With a better fit, less duplication, and better supplier relationships you can ensure that your colleagues make maximum use of the resources available to them.

A solid needs assessment will give you the hard data and strong arguments to have better, and dare I say easier conversations with those who hold the purse strings because it's hard to mount arguments against real, concrete business needs.

Finally, the process of discussing your colleague's needs – and advocating for those needs – is also a terrific opportunity to demonstrate what your department does, and what it can achieve across your organization.

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