FUTUREPROOFING THE COMMUNITY SERVICE WORKFORCE

Synthesis Activity 3: Identify skills needs

Building Data Management Capacity

CANADIAN CENTRE FOR NONPROFIT DIGITAL RESILIENCE

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Activity Overview: Identify skills needs

An overview of how to identify skills needs and what sub-activities to expect

Activity Overview: Why identify skills needs?

Key Objective
This activity leverages the articulated tasks from the User Story Map to identify the skills required within your organization, based on your processes and day-to-day work. It also facilitates matching staff to relevant upskilling opportunities through linked resources and no/low-cost trainings.

Why identify skills needs?

Identifying your digital skills will enable you to

- Identify skill requirements for specific positions to support development or hiring
- Identify where specific training or training tools may be helpful for staff, such as specific instructional guides for your organization's process, catered to your CRM.
- Articulate expectations for existing staff around data entry, technology use, and other tasks.
- Link staff's activities to broader outputs of the organization: for example, data collection about clients' program completion is consolidated for use in the Annual Report.

Activity Overview: Sub-activities to expect

3.1. Articulate required skills for each role

Create an additional row in the existing User Story Map that reflects on the specific skills each role needs throughout the process to identify skills gaps

3.2. Identify opportunities for skills growth

Reflect on guiding questions to describe the required skills set for those involved in the process and reference the Digital Skills Matrix to identify areas for improvement

3. Identify skills needs sub-activities

3.1. Articulate required skills for each role

3.2. Identify opportunities for skills growth

Prepare for Synthesis Activity 3: Identify skills needs

Who should lead this activity?

These exercises are most effective when led by a senior manager who has strong understanding the skills staff have and ideally, their interests, either across teams or within their own team.

What types of sub-activities to expect?

Sub-activity 3.1 requires you to reflect on the specific skills needed in your process by **creating a row** in the User Story Map. Sub-activity 3.2 involves **guiding questions** while **referencing a tool,** Digital Skills Matrix, to help identify opportunities for training.

Tip



Writing concise responses to the guiding questions encourages intentional reflection and enables staff to validate your thoughts. If time is limited, simply reviewing the guiding questions can still serve as a helpful reference.



How much time to estimate for this activity?

2 to 4 hours depending on the number of staff roles mapped in the User Story Map process.

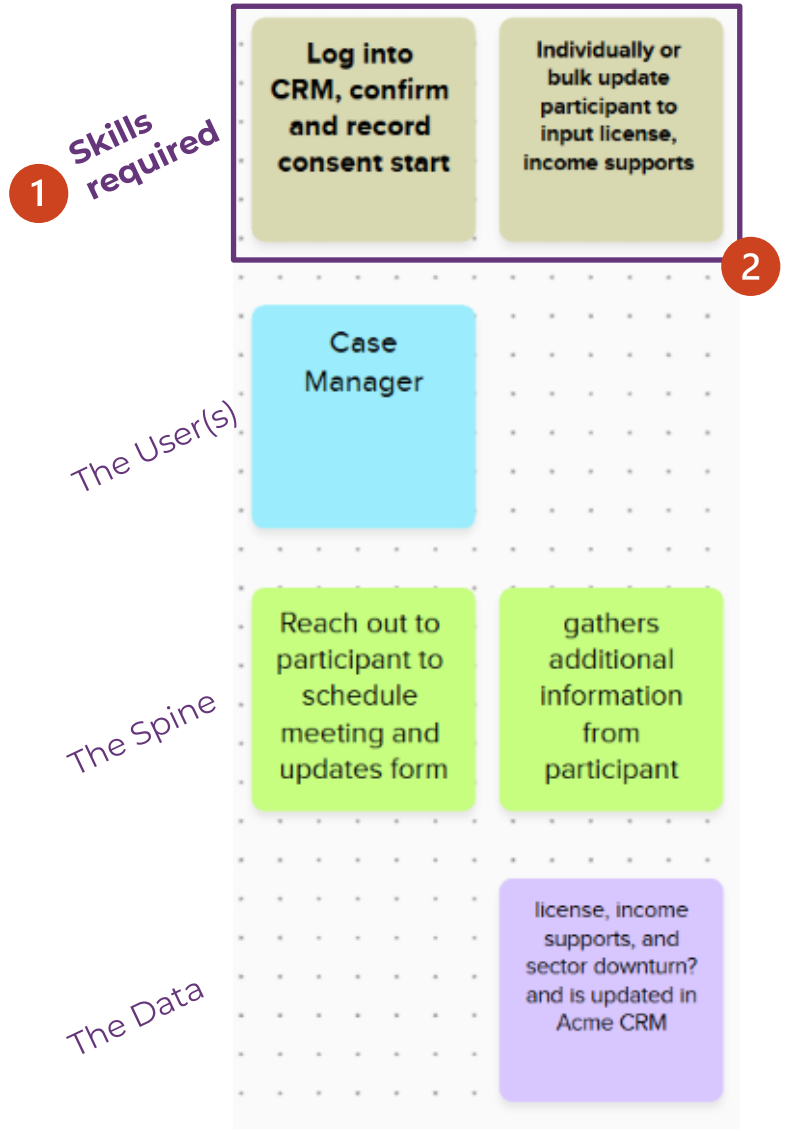
3.1. Articulate required skills for each role
(1/1)

1. **Create a new "Skills Required" row** above the User category in the User Story Map
2. **Write out the different skills required for the User to know,** from start to finish of the process.

   Use the Digital Skills Matrix as a reference guide to identify/define specific skills needed and identify potential opportunities.

   Example:

   - Case managers need to know the importance of tracking participant consent
   - Case managers need to understand how to use Acme CRM for logging in, updating participant and bulk uploading participants into Acme CRM.



3.2. Identify opportunities for skills growth
(1/3)

1. **Reflect on the skills gap within your organization or team** using the following guiding questions and the new "Skills required" row created in sub-activity 3.1:
   - Are all staff aware they are responsible for the tasks identified? If not, which staff?
   - Do staff in this role have the skills to perform these tasks? If not, which skills?
   - Are there specific gaps or growth areas for individual staff that, if addressed, would support the objectives of the process or the broader organization goals? These could include individual skills an individual is looking to develop or skills slightly beyond their current level of expertise that when cultivated, can enhance organizational capacities.

Tip



Staff may already have the skills but not realize they are responsible for certain tasks. If so, share the User Story map and walk them through it, or better yet, hold a team meeting to clarify expectations.

3.2. Identify opportunities for skills growth
(2/3)

2. **Consider which is the ideal configuration to train staff,** some options include:
   - Training a few individuals on a 1-to-1 basis as they require specialized or unique training
   - Training groups of staffs on general skills that would help staff carry out these tasks.
   - Training small sets of groups/roles in specific skills to each group
   - A combination of a few of these options

Tip



Training plans can take the form of formal documentation, such as your organization's existing templates or one like this.

3.2. Identify opportunities for skills growth
(3/3)

3. **Identify opportunities for coaching or training,** related to the specific configurations in the previous step. Consider the following:
   - 1-on-1 mentorship or coaching. Intentionally pairing staff with strong digital skills with those who have skill gaps can effectively enhance overall digital capability across the organization.
   - Short, simple 1-page documentation of common or critical tasks. Documenting can be time intensive but having a reference guide is helpful for staff and can be reused to onboard new staff for simple processes like creating a new participant in the system or enrolling a participant in a program.
   - Formal free and low-cost training opportunities. Use the Digital Skills Matrix to reference and identify potential opportunities or use the definition language to identify other options.

Tip



Overtime, consider if there is budget to move internal staff roles to prioritize a current staff with more digital skills to be leveraged in a role that is required to use them or to hire new staff to address any digital skills gap. The Digital Skills Matrix can help identify specific skills in a new staff role.