Optical Team Training Needs Assessment

A practical planning worksheet for practice owners, managers and team leaders. Complete it together with the people you supervise, then use the action plan to prioritise appropriate learning.

1 | Practice and review details

Practice / organisation	Completed by	Review date
Team / location:	Next review:	

2 | Team roles and current priorities

Note the main roles in the practice and the skills needed now or in the next 6–12 months. Do not record unnecessary personal or sensitive employee information.

Role / team group	Main responsibilities	Skills or knowledge to strengthen	Priority (H/M/L)

3 | Where are the gaps?

Use team discussions, supervision, service changes and quality feedback. For each skill area, mark current confidence and the level required for the role.

Skill / task / topic	Current level (1–5)	Required level (1–5)	Evidence or example

Scale: 1 = little experience or confidence; 3 = developing; 5 = confident and consistently demonstrated. This is a planning scale, not proof of competence.

4 | Choose suitable development routes

Consider what would best address each priority: a recognised qualification, targeted development, workplace coaching, CPD or another resource.

Priority / learning outcome	Who needs it? (role/group)	Potential learning route	Decision / next step

Examples of routes to consider: Level 2 Supporting Optical Practice; Level 3 Senior Optical Assistant; relevant Scottish Level 5 or 7 pathways; bespoke workshops or e-learning; peer review CPD for eligible registrants; supervised workplace learning. Always check course entry and assessment requirements.

5 | Practical delivery and support

Which arrangements will help staff complete their learning alongside work?

Planning question	Your decision
Study time available during the working week	
Tutor, manager or mentor support	
Workplace tasks / evidence or resources needed	
Budget, approvals and preferred start date	
Barriers (e.g. rotas, access, workload)	

6 | Team development action plan

Action / target	Owner / role	Target date	Progress / outcome

7 | Review whether training helped

Agree the outcome before training starts. Review what has changed in knowledge, confidence or workplace practice — not just course attendance.

Intended improvement	What evidence will show progress?	Review date	Result / next action

8 | Final decisions and follow-up

Top three priorities for this review:

Who will take the next steps, and when will the plan be reviewed?

Useful Insight Optical Training links

Training for Employers — https://insight-optical.co.uk/optical-training-for-employers

Compare qualifications — https://insight-optical.co.uk/ourcourses

How our courses are delivered — https://insight-optical.co.uk/how-our-courses-are-delivered-2

Bespoke training and consultancy — https://insight-optical.co.uk/bespoke-consultancy

Peer Review CPD — https://insight-optical.co.uk/peer-review-cpd

Contact us — https://insight-optical.co.uk/contact-us-2