WHS DOCUMENTS & TEMPLATES

DOC-TNA-TPL · Training Needs Analysis and Competency Matrix

Product Overview

For: Australian businesses of any size: managers, supervisors, HR, training coordinators and WHS advisers

Version 1.0 · 15 November 2026

SAMPLE

A training needs analysis that works from each role's tasks and risks to the licences, competencies and training it needs, and an Excel competency matrix that shows, worker by worker, what is current, due, expired or missing.

The Training Needs Analysis (Word and PDF) takes one role at a time: its tasks and their risks, the licences, qualifications and competencies each needs, the requirements every worker in the role must meet, the gaps, a training plan, and a check that the training worked on the job, not just in the classroom.

The Competency Matrix (Excel) has one row per worker and one column per competency: enter the expiry date, 'Current', 'Required' or 'N/R'. Expired items and missing requirements show red, and items due within 60 days amber. The Required by Role sheet shows what each role needs. Rename the columns to suit your business.

Written once for Australia, to the model WHS laws, in plain terms that also work in Victoria. The guide's state and territory notes show where the law differs, including the regulator to contact. Made by Orana Skills Centre.

What is included

Item	File
Excel competency matrix: one row per worker, one column per competency, expired and missing items red, due items amber, requirements by role	02_TEMPLATE/Competency Matrix.xlsx
Training needs analysis: tasks and risks, requirements, gaps, a training plan and a check that it worked	02_TEMPLATE/Training Needs Analysis.docx and .pdf
How to Use This Template: how to complete and adapt it, the law in brief, state and territory notes, records and every placeholder	01_START_HERE/How to Use This Template.pdf
Read Me First, Product Overview, Permitted Use Terms and Version Information	01_START_HERE/ (PDF)

Who it is for

- Businesses that need to show their workers are trained and competent for their work
- Training coordinators and HR planning the year's training
- Supervisors who need to see at a glance who is cleared for what

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SAMPLE · Training Needs Analysis and Competency Matrix · Buy the full editable version:
training.oranaskillscentre.com/documents/training-needs-analysis-and-competency-matrix

How to Use This Template

How to complete, adapt and keep the training needs analysis and competency matrix

1 What this template is for

Workers need the knowledge and skills to do their work safely, and some work needs a licence. A training needs analysis works out what each role needs from its tasks and risks; the competency matrix shows who has it, who does not, and what is about to expire.

2 How to use it

Step	What to do
1	List the roles in the business. For each, complete the Training Needs Analysis with the people who do the work and their supervisor.
2	Rename the matrix columns to the competencies your roles need, and mark each role's requirements on the Required by Role sheet.
3	Enter each worker in the matrix, sighting licences and certificates as you go. Mark anything needed but not held as 'Required'.
4	Plan the training and assessment to close the gaps, highest risk first. A worker without a required licence or competency does not do that work.
5	Check that training worked: watch the work, or verify competency on your equipment.
6	Check the matrix each month, book refreshers before they expire, and review the analysis when tasks, plant or the law change.

3 Who does what

Who	What they do
Manager or training coordinator	Runs the analysis, keeps the matrix and books training
Supervisor	Says what the work needs, checks competence on the job, and stops work a worker is not cleared for
Workers and HSRs	Say what they need to know, and where training has not matched the real work

4 The law, in brief

The WHS laws require a business to provide the information, training, instruction and supervision workers need to work safely, suitable to the nature of the work, the risks and the controls. Some work and plant needs a high risk work licence, and some hazards have their own training requirements in the regulations, such as hazardous chemicals, confined spaces, asbestos and construction induction. Elected health and safety representatives are entitled to approved training.

This template is written once for Australia, to the model WHS laws that the Commonwealth, New South Wales, Queensland, Western Australia, South Australia, Tasmania, the ACT and the Northern Territory have adopted, each with its own variations. Victoria has its own Occupational Health and Safety (OHS) laws. The template uses plain terms that work in every jurisdiction; the state and territory notes below show where the law differs.

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Right-click > Change Picture

[Company name]

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Training Needs Analysis

Work out the licences, competencies and training a role needs, the gaps, and the plan to close them

Role, team or site		**Completed by**	
Workers and HSRs consulted		**Date**	
Number of workers in the role		**Review date**	

How to use it

- Complete one analysis for each role, or for a team that does the same work, with the people who do it and their supervisor.
- Work from the tasks and their risks to what people need to know and be able to do. Training supports controls; it does not replace them.
- Enter what each role needs in the competency matrix, and close the gaps with the plan in part 4.

1 The role and its tasks

Task	Main hazards and risks	Higher risk?	Licence or qualification needed	Competency or training needed
e.g. Load and unload trucks with the forklift	Pedestrians struck; load falls; tip-over	☐ Yes ☐ No	High risk work licence (forklift)	Forklift VOC on our trucks; site traffic rules
		☐ Yes ☐ No		
		☐ Yes ☐ No		
		☐ Yes ☐ No		
		☐ Yes ☐ No		
		☐ Yes ☐ No		
		☐ Yes ☐ No		

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Training Needs Analysis and Competency Matrix

END OF THE FREE SAMPLE

This sample shows a few pages, so you can judge the layout and the quality. A training needs analysis that works from each role's tasks and risks to the licences, competencies and training it needs, and an Excel competency matrix that shows, worker by worker, what is current, due, expired or missing.

What the full product contains

- **Excel competency matrix: one row per worker, one column per competency, expired and missing items red, due items amber, requirements by role**
  02_TEMPLATE/Competency Matrix.xlsx
- **Training needs analysis: tasks and risks, requirements, gaps, a training plan and a check that it worked**
  02_TEMPLATE/Training Needs Analysis.docx and .pdf
- **How to Use This Template: how to complete and adapt it, the law in brief, state and territory notes, records and every placeholder**
  01_START_HERE/How to Use This Template.pdf
- **Read Me First, Product Overview, Permitted Use Terms and Version Information**
  01_START_HERE/ (PDF)

Formats

- Word (.docx), editable, with your logo and business name in the header
- Excel (.xlsx), editable, with dropdowns and formulas (no macros)
- PDF copies of the Word documents, for printing blank
- Delivered as a single ZIP download

Get the full editable documents

https://training.oranaskillscentre.com/documents/training-needs-analysis-and-competency-matrix

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