

STANDARD TASK ANALYSIS FORM

6/1/2011

Duty/Task: A-1 Develop business plan									
STEPS (Required to Perform the Task)	PERFORMANCE STANDARDS (Observable & Measurable Criteria)	TOOLS, EQUIPMENT, SUPPLIES & MATERIALS (Needed)	REQUIRED KNOWLEDGE AND SKILLS (Math, Science, & Language)	SAFETY (Concerns)	WORKER BEHAVIORS (Important to Worker Success)	DECISIONS (Identify Decisions that Must be Made by the Worker)	CUES (Identify the Data Needed for Making Correct Decisions)	ERRORS (Indicate What May Result if Incorrect Decisions are Made)	
1 Define why a business plan is needed and review a completed example of a business plan	1 Reviewed an example and was able to identify the main components of a business plan and how they integrate and how the example applies to his/her business/industry. Was able to define why you needed a business plan (financing, decision making, communicate with partners, focus the business)	1 Computer with internet access, colleague with business plan expertise, sample business plan	1 Research skills, basic math skills, business knowledge, analytical skills, basic financial knowledge, communication skills, interpersonal skills	1 N/A	1 Creative, visionary	1 What is relevant in this example to my situation? Where else might I look for relevant examples? Where will I find a competent expert to help me understand and develop a business plan? Do I have the correct information to complete the forms? Is this example protected in some way legally?	1 Sections of the example related to a similar business, respected organizations and individuals within the industry, feedback from experts you consulted	1 Won't be able to accomplish defined business goals, may not be able to get funding, permits, insurance, etc.	
2 Develop SWOT analysis to identify personal and business goals, internal strengths and weaknesses, and external opportunities and threats	2 Developed a detailed SWOT analysis and clearly articulated how your business fits you, your business goals, and the industry. Developed business goals based on SWOT analysis	2 SWOT analysis template, completed example of a SWOT analysis, example of a SMART goal	2 Knowledge of SMART goals, knowledge of the industry, knowledge of personal goals, knowledge of the market and community	2 N/A	2 Analytical, introspective, detail oriented, methodical, knowledgeable	2 Can I objectively assess my strengths, limitations? Can I scan the environment to identify the opportunities and threats? Can I set SMART goals? Can I identify gaps in my overall strategy based on the SWOT?	2 Data sources were well-founded, industry is fairly represented, goals are based on solid assumptions, gaps were clearly identified	2 Won't be able to objectively analyze the business relative to internal and external factors	
3 Define the management factors of your plan such as property and equipment, HR, legal and regulatory, recordkeeping and business history	3 Management factors were clearly identified and sources used were credible	3 List of management factors, examples of supporting documents	3 Business knowledge relevant to the business factors, research skills, analytical skills, interpersonal skills	3 N/A	3 Analytical, methodical, knowledgeable, thorough, practical	3 What are the management factors in my business plan? Have I objectively assessed those factors? Do I understand business practices and risks? Do I know how to minimize risks?	3 Data sources were well-founded, risk factors are identified and addressed, can clearly articulate capacity to accomplish the goals	3 Won't have what is needed to accomplish business goals, will be vulnerable to risks	
4 Define the marketing plan (see A-2)	4	4	4	4	4	4	4	4	
5 Prepare financial section of the plan to include financial assumptions, cash flow, and financial statements	5 Accurately completed the financial portion of the business plan based on solid assumptions	5 Bank statements, financial worksheet templates, completed examples of financial documents, documentation to verify financial assumptions, computer with spreadsheet and accounting software	5 Basic math and accounting skills, financial knowledge of the industry, analytical skills, research skills, computer skills	5 N/A	5 Accurate, detail oriented, thorough, knowledgeable, resourceful	5 What financial documents do I need to complete? What information do I need? What form does the information have to be in? What adjustments do I need to make, and are they feasible? Do these assumptions fit with my short and long-term goals?	5 Completed examples, data sources are well founded, assumptions are credible, completed documents look appropriate and are synergistic with the rest of the document	5 Won't have the funding needed to support the business, business will be exposed to unnecessary risks, will make bad decisions based on flawed data	
6 Draw the plan together by reviewing the previously completed sections for how they fit together, preparing an executive summary, and identifying gaps/areas where you need assistance	6 Concisely completed an executive summary of one page, reviewed it with a knowledgeable expert, and identified any final improvements needed to finalize the business plan	6 Business plan example, previously completed sections, trusted colleague, computer with spreadsheet and word processing software	6 Writing skills, interpersonal skills, analytical skills, computer skills, working knowledge of business plans, knowledge of required stakeholder information, ability to look at your business through the perspective of others such as insurance providers, bankers, etc.)	6 Awareness of protecting the confidentiality of the business plan	6 Thorough, detail oriented, open minded, follow-through	6 What do I need to complete the plan? Who can I get to review it? What changes do I need to make? How will I use this plan? How will I protect this plan?	6 Feedback from trusted colleague, information provided is what is required by stakeholders, information is useful to make business decisions and provide focus	6 Won't have needed support for the business, business won't have focus	
Analyst: John Moser			Specific Relevant References:						
Expert Workers:			1 Business plan examples						
Julie Fox			2 Mindjet MindManager software						
Rob Leeds									