

Mission, Job and Task Analysis: Step-By-Step Guide For 1st Time Users

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1. Introduction

A step-by-step process is presented to assist analysts in conducting a mission, job and task analysis as well as identify whether training is needed to perform the tasks. For in depth information, please refer to Chapters 3 to 8 of ADVISOR “Align Training with Organizational Goals” User Guide. Remember that context sensitive help for each screen is also available by clicking on the Help (button).

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3. Setup Organization/Units


To find out where training budgets and resources should be allocated, as well as maximize your training investment and demonstrate its value, you should have a clear understanding of your clients' needs – i.e., their missions/goals, tasks needed to achieve their objectives, as well as the knowledge and skills needed to perform these tasks. The missions/goals of internal clients (i.e., business units) as well as external clients – including hierarchy – can be represented in this section.

Step 1. To create a new Client, click on the  **Clients** folder.

Step 2. Click on the [Add] button (top left corner).

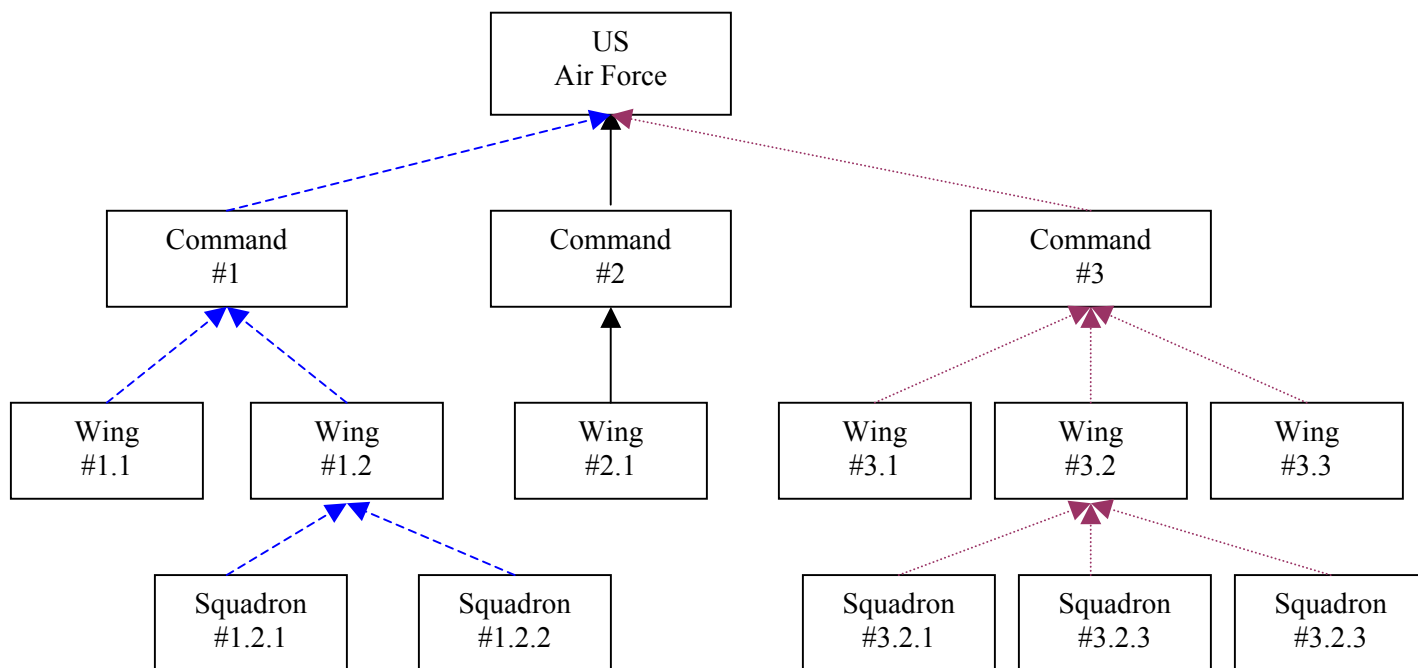
Step 3. Input the Division Name and Contact info. Data required by ADVISOR is identified by a red asterisk (*). Next, click on the [Defaults] tab to specify Annual Productive days, Working Hours per Day and Fringe Benefits Factor for the Division; and then the [Benchmark Data] tab to specify # of Employees in Division, Annual Payroll of Employees, # of Employees Trained [per year], # of Trainers as well as the Annual Training per Employee [hours]. Click Submit (button) when ready to save – i.e. create client.

Note:

- To edit an existing client (business unit), click on the  **Clients** folder then click on the client's name. Make required changes and click the Submit (button) to save.
- If Job Profiles (Occupations) have been defined under the Master Job Profile folder, a Job Profiles tab will also appear. To specify Job Profiles (Occupations) for this client (business unit), click on the Job Profiles tab, place checkmarks next to the appropriate groups and click the [Submit] button to save.
- You may also share your analysis with colleagues (i.e., Users within the same Training Division) by clicking on the Sharing tab, placing checkmarks next to their names and click the [Submit] button to save.

Step 4. ADVISOR can easily mirror the hierarchy of the Client's organization. In other words, the organization may be divided into multiple divisions and the impact of each unit's missions/goals on the parent unit can be established. For example, within the Air Force, a Squadron reports to a Wing, who in-turn reports to a Command. Moreover, the primary mission/goal of each division is to support the parent unit in meeting its objectives.

To set-up a sub division for a Client, click on the **Client Divisions** folder under the **Clients** folder, then click on the [Add] button. You will be prompted for the Division Name and Contact info as well as other relevant data indicated in the Step 3.



4. Setup Missions/Goals


To identify and prioritize the missions/goals of each unit/division, as well as how they support the parent unit in meeting its objectives.

Step 5. Click on the  **Mission Analysis** folder under the  **(Client/Client Division)** node.

Step 6. Click on the [Add] button (top left corner).



Step 7. Input the Mission/Goal Title, Importance, Desired Performance as well as other relevant data and click the Submit (button) when ready to save – i.e., create mission/goal.

Note:

- To edit an existing mission/goal, click on the  **Mission Analysis** folder then click on the mission/goal. Make the required changes and click the Submit (button) to save.
- The significance of each mission/goal is specified in the Importance field. The relative weight of each mission/goal is assigned as follows: critical=4, very important=3, important=2 and somewhat important=1. ADVISOR relies on these weights to identify the most critical tasks, knowledge and skills and in-turn where money and resources should be allocated.
- The performance criteria/standard for evaluating whether the unit has successfully achieved the mission goal is specified in the Desired Performance field. Therefore, the statement should be objective, observable, and measurable – i.e., it should include measures of accuracy, speed, quantity and quality. The standard should:
 - Indicate how well the mission/goal must be performed.
 - Include sufficient details to accurately communicate the requirement.
 - Be measurable and objective.
 - Describe an acceptable product, process or both. Product standards are generally described in terms of quantity, accuracy, tolerances, completeness, format, errors and clarity. Process standards are generally described in terms of sequence, completeness, accuracy and speed of performance.
- The impact of the mission/goal on the parent unit missions/goals is indicated under the [Mission Impact] tab. Once again, the relative weight of each mission/goal is assigned as follows: critical=4, very important=3, important=2 and somewhat important=1.

5. Setup Job Profiles (Occupations)







Within each division, Job Profiles (Occupations) needed to achieve unit, and in-turn organizational goals are identified in this step. The tasks for each Job Profile can be assembled from core competencies as well as Individual Tasks needed to achieve the division's missions/goals (Section 4).

Step 8. Click on the  **Job Analysis** folder under the  **(Client/Client Division)** node.

Step 9. Click on the [Add] button (top left corner).

Step 10. Input the Job Title, a brief overview as well as other relevant data and click the Submit (button) when ready to save – i.e., create job profile.

Note:

- To facilitate the analysis process, common Job Profiles (Occupations) including core competencies (Tasks) can be setup under the  **Master Job Profile** folder under the  **Clients Templates** folder and imported under various Client Divisions using the Job Profiles tab. Details on setting up Job Profiles (occupations) under the  **Master Job Profiles** folder are presented in Chapter 7 of “Align Training with Organization Goals” User Guide.
- The profile of each group, including financial data as well as instructional design characteristics that may impact the effectiveness of alternate delivery media can also be specified in this section by clicking on the  **Financial Data**,  **Characteristics**, or  **Attitude** nodes, completing relevant sections and clicking the [Submit] button to save.






6. Setup Tasks







Step 11. Click on the  **Task Analysis** folder under the  **(Job Analysis)** node.

Step 12. Click on the [Add] button (top left corner).

Step 13. Input the Task Title, Desired Performance as well as other attributes. Next, click on the [Conditions] tab and complete, followed by [Safety] tab and [Impact on Goals] tab. Click on the Submit (button) when ready to save – i.e., create task.

Note:



- **Status:** To facilitate data sharing and minimize the effort required to analyze Tasks, a Search function is provided to help analysts locate and copy existing Tasks. To allow analysts within your Division to utilize Tasks that you have created (i.e., search for and import, but not edit or delete), select the "Public" option. Otherwise, the Task is private and is not accessible by the Search function.
- Based on Task's **Difficulty**, **Importance** and **Frequency**, the DIF model is used to determine whether personnel require training in order to perform the Task. The recommendation is presented under the  **Training** node under each  **(Task)**. You may of course, override system's recommendations.
- **Sub Divide Tasks:** A Task can also be divided into multiple levels of Sub Tasks. Since Individual Tasks require one individual to complete, each Task can only be assigned as a single unit (including all Sub Tasks) to a single Job Profile (Group). In other words, if a Task is divided into Sub Task A and Sub Task B, you cannot assign Sub Task A to the Sales group for example, and Sub Task B to the Marketing group.
- **Impact on Goals** fields indicate the significance of each task. The relative weight of each task is assigned as follows: critical=4, very important=3, important=2 and somewhat important=1. If the mission/goal has a monetary value, then the weights are used to compute the monetary value of the Tasks. ADVISOR relies on these weights to compute the relevant impact of each task, knowledge and skill and in-turn where money and resources should be allocated.
- If References have been defined under the  **Master Reference List** folder under the  **Clients Templates** folder (Chapter 9 of "Align Training with Organization Goals" User Guide), a [Reference] tab also appears after the [Safety] tab – i.e., to link Task to a specific mandate, requirement, manual, etc. By establishing this link, in addition to documenting the reasoning behind the Task, analysts can quickly identify which Tasks (including knowledge, skills, attitudes, job aids and tools) are affected – should there be a change in a specific mandate, requirement or manual.
- To facilitate the analysis process, you may also search for and copy Tasks by clicking on the [Search] tab in  **Task Analysis** folder. Search can be conducted by Mission, Job Profile or Keyword. To copy, place checkmark next to the desired Tasks and click the [Submit] button.

Step 14. The following four folders may be presented under each  (Task):  **Steps**,  **Cues**,  **Measures** and  **Requirements**. To add a new Step, Cue or Measure for a Task, click on the corresponding folder,  **Steps**, for example, then click on the [Add] button, input the required fields and click the [Submit] button to save.




7. Define Requirements for Individual Tasks

Knowledge, skills and attitudes as well as job aids, policies and tools needed to perform the Task can also be defined. By establishing clear requirements for each Task, the knowledge, skills and attitudes of each individual can be easily evaluated to reveal knowledge/skill gaps, as well as determine whether new/improved job-aids, policies, procedures and/or tools can improve performance and productivity.



Knowledge/Skills

Step 15. To identify knowledge/skills needed to perform the Task, click on the  **Knowledge/Skills** folder under the  **Requirements** folder, and then click on the [Add] button. You will be prompted for the knowledge/Skill title and learning objective/outcome. Input the required information and click the [Submit] button to save.



Note:

- Once knowledge/skill is defined, the  **Possess Knowledge/Skills** node is presented under the  **Requirements** folder for identifying knowledge/skill gaps. To indicate the knowledge and skill gaps for this job profile (occupation), click on  **Possess Knowledge/Skills** node, remove checkmark next knowledge/skills that they do not possess and click the [Submit] button to save.



Job Aids

Step 16. To identify job aids needed to perform the Task, click on the  **Job Aids** folder under the  **Requirements** folder, and then click on the [Add] button. You will be prompted for the job aid title/description. Input the required information and click the [Submit] button to save.



Policies/Procedures

Step 17. To identify policies/procedures that should be adhered to when performing the Task, click on the  **Policies/Procedures** folder under the  **Requirements** folder, and then click on the [Add] button. You will be prompted for the policy/procedure title/description. Input the required information and click the [Submit] button to save.



Note:

- If Policies/Procedures have been defined under the  **Master Policies List** folder under the  **Clients Templates** folder (Chapter 9 of “Align Training with Organization Goals” User Guide), a [Classification] tab would also appear to link the defined policy to a common, organization wide, classification system. By establishing this link, analysts can quickly identify which Tasks (including knowledge, skills, attitudes, job aids and tools) are affected – should there be a change in a specific policy/procedure.

Tools

Step 18. To identify tools needed to perform the Task, click on the  **Tools** folder under the  **Requirements** folder, and then click on the [Add] button. You will be prompted for the tool title/description. Input the required information and click the [Submit] button to save.


Note:



- If Tools have been defined under the  **Master Tools List** folder under the  **Clients Templates** folder (Chapter 9 of “Align Training with Organization Goals” User Guide), a [Classification] tab would also appear to link the defined tools to a common, organization wide, classification system. For example, HP as well as Dell Pentium IV Computers can be classified as Pentium IV. By establishing this link, analysts can quickly identify which Tasks (including knowledge, skills, attitudes, job aids and policies) are affected – should there be a change in a specific tool.

Training

Step 19. To find out if training for the Task is recommended, click on the  **Training** node. Based on Task's difficulty, importance and how frequently it is applied, the following recommendations may be provided along with the reasons.

- No Train – implies that instruction is not needed to perform the Task.
- Train – implies that instruction/exercises are needed to attain and retain the required knowledge, skills and attitudes.
- Over Train – implies that practice beyond what is required for retention is needed.

To override the systems recommendations, select the desired Training Requirement, lock  your recommendation and click the [Submit] button to save.


Step 20. Instructional goals (learning objectives) provide clear statements of the knowledge, skills and attitudes that individuals should possess in order to perform the Task. The instructional goals should specify the conditions under which knowledge and skills should be exhibited and the standard to which it will be performed. The instructional goals should also reflect the gap in knowledge and skills between the entry-level for the position and the mastery level needed to perform the Task. To add a new Instructional Goal, click on the  **Instructional Goals** folder under the  **Training** node, and then click on the [Add] button. You will be prompted for the Instructional Goal, Length, Learning Objective/Outcome and Classification. Input the required fields and click the [Submit] button to save.


Note:

- Instructional Goals can be linked to courses/training programs needed to develop the necessary knowledge, skills and attitudes to perform Tasks at the desired level. Defining instructional goals is therefore critical for establishing clear links between training programs, tasks and missions/goals, demonstrating the value of various training programs and aligning training with organization/units' goals.

8. Generate Reports

Comprehensive reports that outline how each division supports the missions/goals of the parent division, tasks needed to achieve the goals as well as knowledge, skills, job-aids, policies and tools required to perform each task can be generated.

Step 21. To generate a list of Tasks as well as Knowledge/Skills for a job (occupation), click on the **Task List** node under the  **(Job Analysis)** node. The Tasks and Knowledge/Skills are rated from most to least critical, and whether training is needed. You may print and/or save the report using the corresponding export and print icons (top left corner). To return to ADVISOR, close the Report window.

Step 22. To generate a report, click on the **Report** node under the  **(Client/Client Divisions)** node, select items to be included in the report by placing a checkmark next to the desired sections and click Submit. Note, if the Client Divisions option is selected, the mission, job and task analysis of all corresponding subdivisions will also be included in the report.

Since the report is in html format, you can quickly advance to any section by clicking on the corresponding title in the Table of Contents. You may print or save the report using the corresponding functions in your Browser. To return to ADVISOR, close the Report window.

Step 23. Executive reports that provide a clear line of sight on how various units (sub divisions) are supporting the missions/goals of a parent division [**Goals Top Down View**] as well as which parent missions/goals are supported by a unit (sub division) [**Goals Bottom Up View**], can be easily generated by clicking on the corresponding node.

Since the report is in html format, you can click (drill down) on each mission/goal to find out the tasks performed by various job profiles (occupations) in support of each mission/goal. You may print and/or save the report using the corresponding export and print icons (top left corner). To return to ADVISOR, close the Report window.

Remember that context sensitive help is also available for each screen by clicking on the Help (button). Enjoy!