



Task Analysis for Developing Policies & Procedures Content Users Need and Prefer

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About Raymond Urgo (Mr. P&P)

- Internationally recognized *expert, leader, educator, author, and speaker* on P&P Communication
- Wrote policies and procedures at age 7 for neighborhood friends
- 1993 founded consultancy, Urgo & Associates
- Professional career mission:
To define and promote P&P Communication as a discipline and a way to transform organizations



What You Can Expect

Urgo & Associates' approach to task analysis:

- definitions, examples, models, and anecdotes
- reasons, values, and hidden benefits
- process, techniques and tools
- principles, tips, advice, and opinions
- resources and contacts

What Is a Task?

- Definition: A task is the smallest unit of work that a person performs to produce an output or an outcome.
- Description: A task has
 - 2-9 steps or 2-9 guidelines, and
 - its title starts with a verb form.

Examples of Tasks and Task Titles

- *Log on to the computer*
- *Calculate monthly net income*
- *Handling an irate customer*
- *Transferring data between systems*
- *Critiquing a piece of art*
- *How to set the table*
- *How to weigh a burrito*
- *Task 3: Confirm your purchase order*

Two Kinds of Tasks

Near-transfer task – a task in which steps are followed to produce a predictable result.

Example: Baking a cake

Far-transfer task – a task in which guidelines are applied based on judgment to produce an intended yet unpredictable result.

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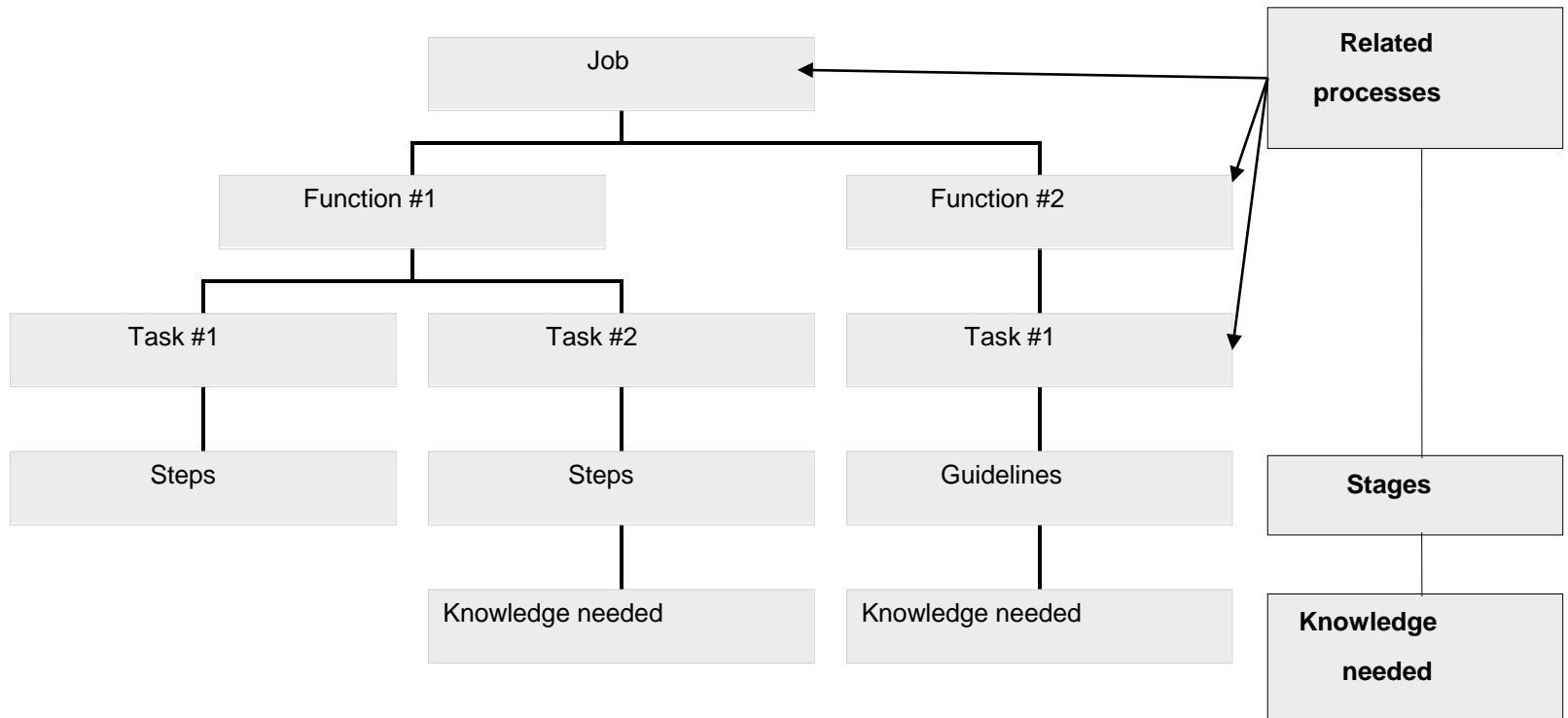
What Is Task (Job) Analysis?

Task analysis is the process of identifying the work breakdown structure for a job or the responsibilities that someone performs.

The task analysis process identifies:

- *job(s)* or performer(s)
- *functions* or responsibilities of job
- *tasks* of functions
- *knowledge* needed for tasks
- *processes* that trigger jobs, functions, and tasks

Diagram of Task (Job) Analysis Hierarchy



Example: Task Analysis for Auto Mechanic's Job

Term	Example
Job	<i>Auto mechanic</i>
Function/Responsibilities	<ul style="list-style-type: none"> • <i>Maintaining car fluids</i> • <i>Diagnosing electrical malfunctions</i> • <i>Repairing electrical malfunctions</i>
Task	<ul style="list-style-type: none"> • <i>How to Check the Oil</i> • <i>How to Fill the Oil</i> • <i>How to Check Transmission fluid</i>
Steps or Guidelines	<ol style="list-style-type: none"> 1. <i>Open the hood.</i> 2. <i>Locate oil dipstick.</i> 3. <i>Pull dipstick out.</i> 4. <i>Wipe dipstick.</i> 5. <i>Put dipstick back in.</i>
Knowledge needed	<p><i>Where to find the oil dipstick.</i></p> <p><i>Have a paper towel handy.</i></p> <p><i>What markings to look for.</i></p>
Process	<p><i>How a Customer's Auto Is Serviced</i></p> <p>(Stages include receiving auto from customer, assigning work to mechanic, billing the customer.)</p>

Why Conduct a Task Analysis?

Three reasons:

- To identify what performers or learners need *to do* and *to know*
- To design for development of content, training, systems, or products that are performance-based
- To assess scope and manage project development

Who Needs and Conducts a Task Analysis?

- Policy/procedure analysts – work practices and content
- Instructional designers/trainers – learning programs and materials
- Product developers – product design and user guides
- Performance improvement specialist – planning or improving work
- Business analysts – systems requirements planning

Talents needed: analytical, process-oriented, facilitative, interviewing, business and emotional intelligence, and optionally subject-matter knowledge

Examples of Projects where a Task Analysis Was Used

- Developing learning materials to train mystery shoppers serving a chain of fast-food restaurants.
- Simplifying the sales and fulfillment process of a company that produces and delivers customized training programs in the real estate industry.
- Organizing work for a young, small, and fast-growing fashion design and retail company.

What Is the Value of Task Analysis?

Entails three approaches to analysis:

- Top-Down (gets the structure)
- Bottom-Up (like fishing, gets the details)
- Across (gets the processes)

Value of these approaches (if done properly):

- 40% longer to do; 40% more effective
- 50% to 80% topic coverage first time
- 80% users prefer performance- vs. subject-based

What Are Hidden Benefits of a Task Analysis?

Basis for...

- revealing nature of situation and star performers
- creating and validating a business case
- establishing working relationships and rapport
- demonstrating professionalism and leadership
- planning scope and depth of need
- estimating, scheduling and tracking development
- designing for topic- or structured-based writing for teams

Tips to Prepare for a Task Analysis

- Clarify your purpose (estimate or implement).
- Identify people to involve: users, subject experts, managers, former managers, star performers, resisters, novices.
- Decide on information gathering technique (interviews, group meetings,) and timing.
- Review existing job descriptions, related content, and optionally subject references and other organizations' practices.

Six Stages in the Task Analysis Process *

1. Identify *audience/users/learners*
2. Identify *processes* (if applicable)
3. Identify *functions* (responsibilities)
4. Identify *tasks* within functions
5. Identify types of tasks (near- or far-transfer)
6. Identify *knowledge* topics needed

* Occurs after the needs assessment and before any development of detail content.

Tips on Identifying Audience and Processes (Stages 1 & 2)

Audiences

- Identify users, learners, position titles, roles
- Identify characteristics – backgrounds, skills, behaviors, and attitudes

Processes

- Know what you mean by a process
- Determine if process already exists or needs to be defined

Tips on Identifying Functions/Responsibilities (Stage 3)

- Consider reviewing job descriptions and ask knowledgeable people.
- List responsibilities as [*Verbing* direct object].

Examples for auto mechanic job:

- *Maintaining* car fluids
- *Diagnosing* electrical malfunctions
- *Repairing* electrical malfunctions

Tips on Identifying Tasks with Others (Stages 4 & 5)

- Use pad paper, flip chart, or post-its
- Set ground rules and expectations
- Use a Task-Topic Chart to collect and refine
- First list “how to’s” then “knowledge needed”
- Ask to fill in the blank: “How to verb object”
- Probe to clarify intent when these verbs are given for “How to_____”: *make / do / learn / understand / know / use / utilize*

What Is a Task-Topic Chart?

A task-topic chart is a tool for identifying and planning needs for content development of

- task topics,
- related knowledge topics or subtopics, and
- sources for gathering information

Tip: Use the completed chart to create the content outline, and to estimate, schedule, and track development.

Example of a Task-Topic Chart

Performer: Records Coordinators-Handling Confidential Records

Task/Topic: How to...	Subtopic/Knowledge Needed and Notes	Resource
Determine type of record	--Define 3 types: bus, transitory, personal --Need definitions and examples of each	PJ; ref book
Classify and save records in DM5	--Need to define DM5 --When to save --Importance of	IT mgr
Etc.		

Example of a Content Outline from a Task-Topic Chart

Stage 3: Evaluating for Acceptable Proposals

Task 1: Receive Proposals

- Who should receive proposals
- Requirements for hard copy proposals
- Procedure: when received on time / when received late
- Example letters to return late-response

Task 2: Verify Proposals Have Required Items

- When to verify proposals
- Who should verify proposals
- Types of items to verify
- If required items is missing

Difficulties to Expect during a Task Analysis Process

- Determining which parts of a job are functions, sub-functions, tasks, sub-tasks, or stages of an overall process.
- Obtaining information or decisions for jobs that are new, in development, or undergoing changes in structure, supervision, or staffing.

Temptations to Avoid during a Task Analysis Process

- Designing content and products based on what others, not necessarily those who do the job, tell you about the job.
- Designing around topic or subject areas the way that traditional learning takes place.
- Loosing focus at the level you are identifying and getting caught up in discussions.
- Under-using your business and emotional intelligence in the task analysis process.

Recommendation: practice exercise

Develop a task analysis for a role or set of responsibilities you are knowledgeable about, either in your work or personal life.

Examples:

- Getting your day started
- Preparing for a holiday celebration

Option: Interview someone knowledgeable about his/her role or responsibilities.

For Further Information on Task Analysis

Hint: Information about task analysis tends to be embedded in overall methods or processes.

- Seek by need or specialty, such as structured writing, instructional design, training, performance, usability, business analysis, policies and procedures.
- Urgo & Associates—www.urgoconsulting.com
 - *The Policies & Procedures Authority* e-newsletter
 - *Ask P&P Expert; Our Resources*
 - Advisory, teaching, and coaching services

About Urgo & Associates – Policies & Procedures Consulting Services

- Advising on P&P. We assess, advise, and teach on strategies and resources for developing and managing P&P systems and information in organizations so they are more competitive.
- Developing P&P. We assess, simplify, and develop effective organizational P&P and usable P&P content.
- Teaching & Coaching. We teach, mentor, and coach P&P professionals on developing, managing, and promoting their careers, business relationships, projects, and talents to be highly valued assets in the workplace.

Recap: What You Can Expect

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For Slides and Contact Information

For this presentation's slides or additional information, contact Raymond Urgo at
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For free resources on P&P or to subscribe to *The Policies & Procedures Authority* e-newsletter, visit www.urgoconsulting.com