

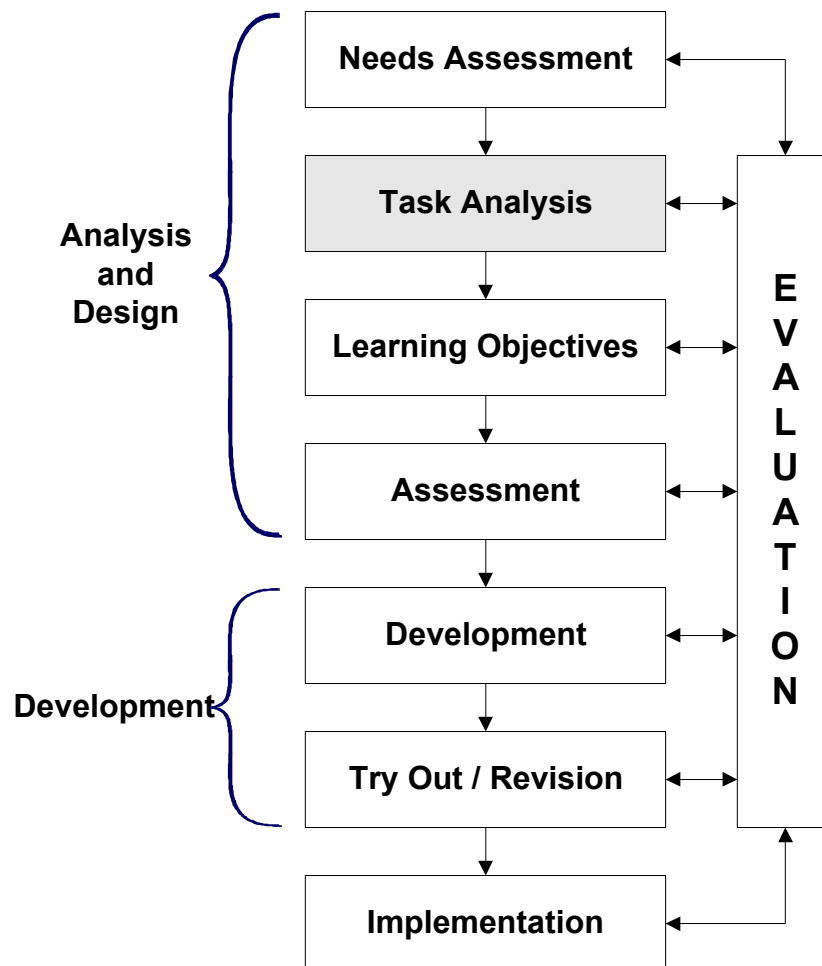
Unit 2

Job Task Analysis

Introduction After needs assessment, the next step in developing effective training is to identify the audience and topics to be trained.

Importance Performing this stage of the ISD process is critical to developing a job-based training course and effective learning materials.

Unit overview The following diagram identifies the stage of the ISD process addressed in this unit.



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Job Task Analysis, continued

Job-based principle For training to be job-based, it must be built on the tasks of the job rather than on a theory or products.

Unit objectives In this unit, you will

- analyze a job down to its most elemental components, *and*
- document your findings.

You will do this with both a case study and your seminar project.

In this unit This unit includes the following topics and lessons.

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What Is a Job Task Analysis?

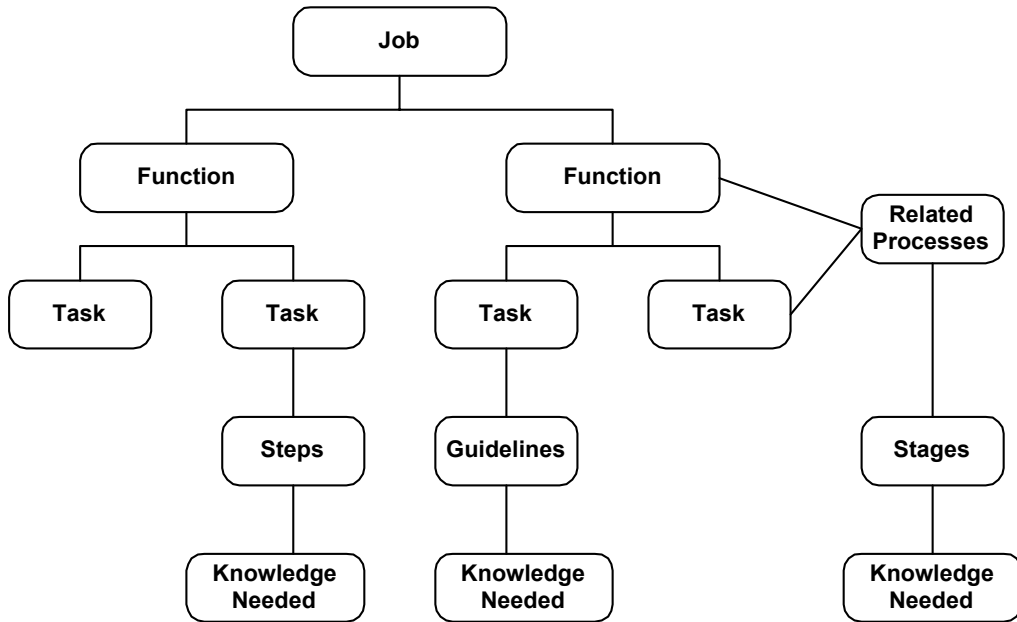
Introduction	<p>In the needs assessment, you determined the need for training because of a lack of certain worker skills and knowledge. In your task analysis, you will ask the following questions.</p> <ul style="list-style-type: none"> • What are the characteristics of the intended learners and what do they already know? • What skills and knowledge does it take to do the job effectively?
Outcome	<p>The outcome of a task analysis is the identification of skills and knowledge that will make up the training program.</p>
Definition	<p>A <i>task analysis</i> is an analytical process applied to the job to be trained. It</p> <ul style="list-style-type: none"> • defines the background of the learners, • determines the detailed behaviors or actions associated with a specific job accomplishment, <i>and</i> • translates job data into course outlines and objectives.
Gathering information informally	<p>There are several actions you can take to complete your task analysis.</p> <ul style="list-style-type: none"> • Observe experienced and successful incumbents. • Observe inexperienced incumbents. • Interview subject matter experts. • Interview and/or survey supervisors. • Review policy and procedure manuals. • Review existing training or job documents. <p><u>Note:</u> These actions will verify that your ideas of job are the same as what your learners actually do on the job. This is called informal validation.</p>
Shortcut	<p>As a shortcut for gathering information, use a structured group process (e.g., focus groups) to do the first level of a task analysis. Involve all major stakeholders in training, including</p> <ul style="list-style-type: none"> • supervisors, • current successful employees, <i>and</i> • target learners, • instructors. <p><u>Note:</u> This shortcut requires good facilitation skills.</p>

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What Is a Job Task Analysis?, Continued

Hierarchy of job levels

To perform the task analysis, systematically identify the various levels of the job. The diagram below shows the levels to analyze and their relationships to one another.



Steps of a task analysis

This table lists the steps for completing a task analysis.

Step	Action
1	Analyze learners and determine prerequisites.
2	Identify job functions.
3	Identify tasks within each function.
4	Identify stages of a process.
5	Is the task procedural? • If yes, identify the steps and go to Step 7. • If no, go to Step 6.
6	Identify guidelines of the principle-based task.
7	Identify knowledge needed to complete the task.

Lesson 1

How to Conduct a Job Task Analysis

Introduction Once you determine that a training need exists and identify the general focus of your training, the next step is to analyze the learners and the job.

Importance A major training principle is, “Base the training on the job.” To accomplish this performing a task analysis is critical. It forms the basis for the rest of the design and development process.

Rule When you do the task analysis, **begin with the job.**

Lesson overview To define the content associated with the job performance, analyze the entire job. This includes defining the

- characteristics of the learners,
- functions of the job,
- job tasks within each function,
- steps or guidelines within each task, *and*
- knowledge needed.

Outcome You will use the documented results to

- plan your course structure,
- write your learning objectives, *and*
- develop your units and lessons for each course.

Lesson objectives Using information provided in a simulated case and your own project materials, you will

- analyze the learners and determine prerequisites,
- identify major functions of the entire job,
- identify the tasks in one function, *and*
- identify the steps or guidelines and knowledge needed for one task.

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How To Conduct a Job Task Analysis, Continued

Order of Topics This lesson includes the following topics.

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Step 1: Analyze Your Learners and Determine Prerequisites

Introduction Good training design involves considering the requirements of the job in terms of the background knowledge and skills of the learners.

Definition of learner analysis *Learner analysis* is the process of defining the

- important characteristics of the target learners to consider in developing training, *and*
- entry-level knowledge and skills learners already have.

Definition of prerequisite A *prerequisite* is a skill or knowledge that learners have prior to starting the training. Because they already have it, prerequisites are not included in your training course.

Note: When you analyze your learners, you will identify existing knowledge and skills. However, you may determine other prerequisites as you complete the entire task analysis.

Factors to consider To analyze your learners and determine the prerequisite skills or knowledge, you need to consider

- who the trainees are,
- experience,
- number,
- homogeneity,
- location,
- reading level,
- existing skills and knowledge,
- native language,
- employment level,
- motivation,
- attitude toward training,
- education level, *and*
- computer skills.

Bank CSR example Throughout our discussion of task analysis, we will refer to a training plan for bank customer service representatives (CSR).

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Step 1: Analyze Your Learners and Determine Prerequisites, Continued

Bank CSR learner analysis

Below is the learner analysis from the bank CSR scenario.

Characteristics/Factors	Data
Number to be trained	<ul style="list-style-type: none"> • 26 immediately, and • all new CSRs as they are hired.
Geographic location (s)	Ten branches within a 40-mile radius
Experience level (homo- or heterogeneous)	<ul style="list-style-type: none"> • At least one year as teller, or • management trainees who have completed basic teller training program.
Education level	All have either a high school diploma or GED. Approximately 50% are attending college now.
Reading level	Average reading level is 5th grade.
Native languages	Variety of cultural backgrounds. All read and speak English fluently.
Attitude toward training	<ul style="list-style-type: none"> • Eager to learn, but dislike school environment. • Resentful of being away from job because of workload and lower pay for training time. • Most like the chance to interact with colleagues.
Prerequisite skills or knowledge	<ul style="list-style-type: none"> • Customer service techniques. • Familiarity with bank policy and procedures.
Other	Availability is limited to one day per week because of workload.

Step 2: Identify Job Functions

Introduction

If you are training an entire job, begin by dividing the job into several non-overlapping functions. Often the personnel department has already done this analysis and you can use it as your starting point.

Definition

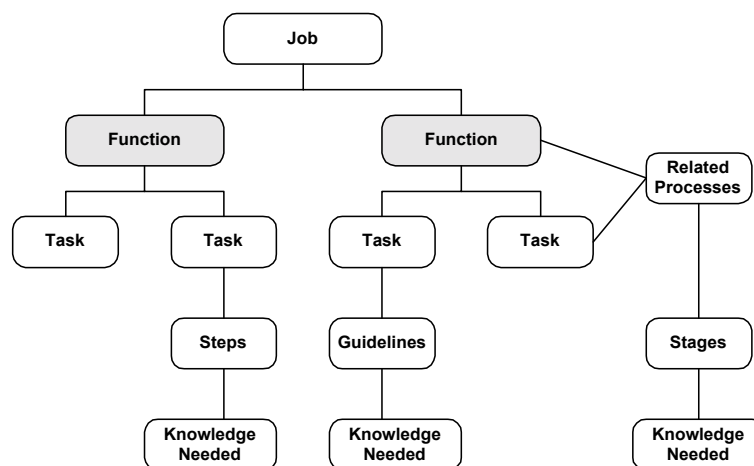
A *job function* is the highest level of job breakdown. It is made up of a number of tasks. A job function depicts the highest level of responsibility and is associated with a reasonable job product or outcome independent of other job outcomes.

Synonyms

Synonyms for the term job function are job responsibilities, key results areas and job duties.

Hierarchy of job levels

The diagram below shows where “Function” appears on the hierarchy.



Number of functions

Jobs vary as to the number of functions each supports. Some jobs may include only one or two major functions. Others have an enlarged scope and may include as many as five to nine functions.

Examples:

- A data entry operator job may include only one or two major functions.
 - An auto mechanic or instructional developer job includes many functions.
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Step 2: Identify Job Functions, Continued

Guidelines

Follow the guidelines below when identifying functions.

- Write the function as an active verb ending in “...ing” followed by the object receiving the action.
Example: **Processing** service orders
- Write the description as a summary of all tasks involved with this function.
- Write the outcome as an observable or measurable product separate from all other function outcomes.

Bank CSR job functions

In Step 1, we saw a learner analysis for a bank’s customer service representative (CSR) training program. In this example, we identify the job functions for the bank CSR.

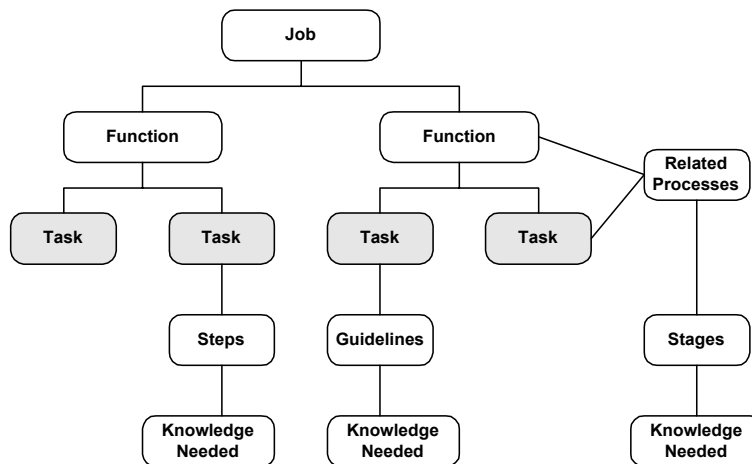
Function	Description	Outcome
Opening accounts	Complete the selection process for a customer by providing correct forms for opening a new account.	New account opened.
Closing accounts	Complete the account closing process for a customer.	Existing account closed.
Providing service to existing accounts	Service existing accounts by answering inquiries, troubleshooting problems, and accessing key personnel to resolve problems.	Customers account needs addressed.
Providing safe deposit box services	Provide the customer with lease, access to, and maintenance of safe deposit box.	Safe deposit box serviced.
Processing loans	Provide appropriate forms, information, and timelines to complete a loan process.	Loan request submitted.

Step 3: Identify Tasks within Each Function

Introduction Once you define each major job function, you are ready to divide each function into tasks.

Definition A *job task* is a job activity usually made up of five to nine steps. It results in one observable end product or decision.

Hierarchy of job levels The diagram below shows where “Task” appears on the hierarchy.



Guidelines for tasks Follow these guidelines to identify tasks.

- Write the task as an active verb with an object receiving that verb. (“You” is the implied subject.)
Example: Rent the safe deposit box.
- Write the description as a statement of the expected end product or as a summary of the steps leading to the end product.
- Keep tasks small or chunked.

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Step 3: Identify Tasks within Each Function, Continued

Guideline for sub-functions

If the number of tasks within a function exceeds about nine, you may need to divide the function into sub-functions. Adding a level to the hierarchy (e.g. sub-functions) is acceptable as long as you are consistent in your labeling as you analyze.

Bank CSR job tasks

In Step 2, we identified a number of job functions for a bank customer service representative (CSR). In reality, we would perform Step 3 by identifying all the tasks of each function. Below we show one function as an example.

Function: Providing safe deposit box services

Task #	Task	Description
1	Rent safe deposit box (SDB)	Provide customer with information. Process rental contract for SDB.
2	Handle customer objections and concerns	Service customer requests and questions according to customer service policies.
3	Provide access to SDB	Provide customer with access to SDB, including locating, removing, and returning box under dual control.
4	Maintain SDB rental contract	Provide customer with renewal forms and other special maintenance as needed.
5	Close SDB rental contract	Provide customer with closure on rental contract.

Procedural vs. Principle–Based Tasks

Introduction Some tasks are completed the same way each time. Others involve judgment. The more consistent the task, the easier it is to train. The opposite is true for tasks that involve judgment.

Importance At this stage of your task analysis, you need to distinguish between

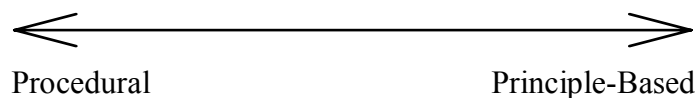
- procedural tasks (Synonym: Near transfer task), *and*
- principle-based tasks (Synonym: Far transfer task).

This distinction allows you to determine how to train each task.

Comparison The table below compares the two types of tasks.

Comparing	Procedural Task	Principle-Based Task
Definition	A job activity that is completed in approximately the same way each time the activity is done.	A job activity involving judgment that is done under a unique circumstance and in a novel way every time it is performed.
Examples	<ul style="list-style-type: none"> • How to log on to the computer • How to fill out a R. O. • How to bake a cake 	<ul style="list-style-type: none"> • How to handle an employee with personal problems • How to make a sale • How to settle a dispute
Transfer from the training back to the job	Since this type of task is always done the same way, it is trained by having learners do the task step-by-step. This transfers easily back to the job and is known as Near Transfer .	This type of task requires analysis and judgment by learners as they use guidelines to perform the task because the circumstances of the situation change. This is harder to train because it requires more practice and is known as Far Transfer .

Continuum The classification of tasks as procedural and principle-based is really a continuum. Most training courses include both types.



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Practice: Identify the Task Type

Directions

Below are a number of job tasks. Determine whether each task is more procedural or principle-based. Label each task as either

- **PRO** for Procedural, *or*
- **PRI** for Principle-based.

- _____ (a) Changing a tire.
- _____ (b) Doing a needs assessment.
- _____ (c) Communicating effectively with customers.
- _____ (d) Diagnosing a disease.
- _____ (e) Flying the Boeing 747.
- _____ (f) Teaching a training course.
- _____ (g) Baking a pie.
-