Research Project:

Tools and Processes:
Situational, Operational and Human Resources Analysis
for SMEs in the Tourism Industry

prepared by:
FuturEd

Dr. Kathryn Barker,
with assistance from Kim Cholette

prepared for:
Saskatchewan Tourism Education Council
on behalf of the
Tourism Standards Consortium (Western Canada) Inc.

January 1999
1. INTRODUCTION

The purpose of this project has been to locate appropriate tools for use in the tourism industry, specifically by small business operators. The tools and processes are necessary for small tourism businesses to conduct operational, situational and human resources development needs analysis. The ultimate focus is human resources for the tourism industry: (1) identifying current and future needs; (2) ensuring appropriate training and development.

This research project has taken the form of a search for tools. The sources have included libraries, the Internet, and commercial enterprises. Criteria for selection have included cost, utility, usability, availability. The task has been to sort through what is available and make recommendations to members of the Tourism Standards Consortium and specifically to the Saskatchewan Tourism Education Council.

The following report sets out:

♦ the underlying premises that guided the project,
♦ the related terminology,
♦ the process followed,
♦ outcomes – a selection of tools and processes,
♦ recommendations for tools and processes to use,
♦ general observations and suggested next steps.
2. GUIDING PREMISES

The premises that guided this project related to (1) the intended users; (2) the nature of business, in general, and small business in particular; (3) the nature of the tourism industry.

The intended user is the independent tourism operator, perhaps with the assistance of a tourism business counselor. The underlying premise for this search is that tools and processes should, therefore, be relatively inexpensive and relatively easy to use.

Small business operators are busy people. They have to possess and use a vast body of skills and knowledge related to both business management and the particular industry they work in. Typically, they have more interest in the industry – e.g., a passion for guiding hikers in the backcountry – than in the technicalities of management: job descriptions, business plans, financial statements, strategic planning, marketing, competitive intelligence, etc. etc. It is assumed that this is the area for which advice and assistance is sought: business in general, and not specific elements of tourism.

In the tourism industry, there are operators of every size. It is assumed that the large operators have resources – both financial resources and technical assistance – when they identify a problem. Therefore, the focus of this project is small operators who may not have either at their disposal.

Providing supports to SMEs and to the tourism industry is critically important to the Canadian economy. In Canada, SMEs comprise 97% of all businesses.¹ Tourism is a growth industry. Providing support to those who develop and manage SMEs in the tourism industry is critical to the sustainability of the industry.

¹ Small Business Primer (Canadian Federation of Small Business, 1998) at http://www.cfib.ca/research/reports/primer98_e.asp
3. TERMINOLOGY

Most terms in business and industry have different meanings in different contexts and to different people. Therefore, for purposes of this project, terminology is used as follows.

3.1. The **tourism industry** encompasses a broad range of products and services, independent and/or interrelated services of every size.

3.2. **Small- and medium-sized enterprises (SMEs)** are those which employ fewer than 50 individuals.

3.3. Advice and assistance – of any kind -- is provided through:

   3.3.1. **expert advice** -- e.g., periodical articles, research reports, and individualized consulting services

   3.3.2. **processes** -- e.g., step-by-step activities to undertake and other standardized practices

   3.3.3. **tools** -- e.g., standardized forms, worksheets, and checklists

   3.3.4. **interactive tools** -- e.g., on the Internet or CD Rom, tools that provide immediate conclusions through active participation of the user  (fill in the blanks, “submit” and voila!)

3.4. Using advice and assistance is dependent on many **usability factors**, including:

   3.4.1. **cost** – ranging from free to very expensive

   3.4.2. **access** – ranging from available immediately or “special order” time lag

   3.4.3. **user-friendliness** (e.g., clear language, size of print, simplicity but not simplistic)

   3.4.4. **utility** – the degree to which intended outcomes are actually reached

   3.4.5. **completeness** – e.g., standalone or part of a related process

   3.4.6. **relationship to the industry** – e.g., ranging from industry-specific to very generalized

   3.4.7. **cultural relevance** – e.g., Canadian, geography-neutral, decidedly non-Canadian
3.5. In the development and management of a business,

3.5.1. **situational analysis** refers to the business in relation to the external environment. Processes and tools to conduct situational analysis include, e.g., environmental scanning, SWOT (Strengths – Weaknesses, Opportunities – Threats) analysis, market research and competitive intelligence, and strategic planning.

3.5.2. **organizational analysis** refers to the situation of a business operations in relation to good business practice. Processes and tools to conduct operational analysis include creating and using business plans including marketing strategies and financial analysis. Organizational analysis is very broad, with a view to identifying problems and operational gaps.

3.5.3. **human resources analysis**, a subset of organizational analysis, refers to the status of current and future needs for staff (paid and volunteer), staff management (job descriptions, hiring practices, labour relations, motivation), and staff training (entry-level preparation, on-site and off-site continuing education).

3.5.4. **training needs analysis**, a subset of human resources analysis, refers to the skills and knowledge of current and future personnel in relation to those that are required of them. Tools and processes to conduct training needs analysis include, e.g., job analysis, skills gap analysis, individual skills assessments.
4. SEARCH PROCESSES

The search for appropriate processes and tools combined the following conceptual areas: (1) tourism and the tourism industry; (2) business management and particularly small business; (3) business and export development; (4) human resources management and development; (5) appropriate and relevant uses of ICTs – Information and Communications Technologies.

This search was undertaken in two parts. In essence, the search for training needs analysis tools – or “work skills analysis” tools\(^2\) – had already been undertaken in a previous project. What has been added in this project is new tools, processes and advice that surfaced in this current search which focused, then, on (1) situational, (2) organizational and (3) human resources analysis tools.

Without question, there are huge amounts of advice and assistance available in a wide variety of formats. The results are set out in Appendix A.

4.1. Sources

A search of the Internet provided long lists of consulting firms, tools and processes, books and software, and research and expert advice that could meet the needs of the tourism industry. Sources for tools and processes are either on the Internet or available from agencies on the Internet, e.g., booklets and courses from the federal/provincial business development centres. The primary sources searched related to small business, business development and planning, training, and tourism on an international basis.

Particularly useful Internet sources included:

1. the federal government through
   - Industry Canada (business development)
   - Regional Agencies (WD, ACOA, FedNor, FORD-Q)

2. provincial/territorial governments
   - business and economic development ministries
   - tourism departments

\(^2\) Work skills analysis tools are those which (1) determine the skills/knowledge required by a job; (2) assess the skills/knowledge already acquired by individuals; and (3) conduct a skills gap analysis that forms the basis for either hiring or training and skills upgrading.
3. banks, businesses, and professional organizations
   ◆ Quicken web site
   ◆ Royal Bank

Other useful sources for this project included:
   ◆ HRDC (training, LMI, essential skills);
   ◆ DFAIT (market development);
   ◆ the tourism industry sector council (skill standards);
   ◆ Business Development Bank of Canada.

In addition to the Internet, the Training and Development Guide from CCH (1998) provides a comprehensive set of processes and tools related to:
   ◆ the organizational context of training
   ◆ defining training needs
   ◆ training needs analysis
   ◆ employee development
   ◆ organizational development

4.2. Selecting Materials

The sheer quantity of materials available had to be narrowed. The criteria for selection, in this order and based on the underlying premises about the users, were:

   ◆ cost: free or relatively inexpensive
   ◆ immediate availability or easily acquired
   ◆ utility – the degree to which intended outcomes are actually reached
   ◆ cultural relevance – either Canadian or geography-neutral
   ◆ completeness – either standalone or part of total process that was included
   ◆ user-friendliness – clear language, simplicity but not simplistic
   ◆ industry-specific (where possible)
   ◆ currency (recent date, reflecting current thinking)
4.3. Sorting The Materials

After rejecting substantial amounts of materials (e.g., those that were expensive or easily accessible), the materials were sorted into the following framework, using the definitions set out above.

<table>
<thead>
<tr>
<th></th>
<th>Interactive tools</th>
<th>Tools</th>
<th>Processes</th>
<th>Advice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Situational analysis</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Organizational analysis</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Human resources analysis</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training needs analysis</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Under this last category, training needs analysis, falls the concept of “work skills analysis tools” that has previously been inventoried and studied by FuturEd for the BC Forestry Continuing Studies Network and the National Literacy Secretariat. For purposes of this project, then, the work skills analysis tools were re-assessed on the basis of the criteria set out by the members of TSC during a teleconference meeting. These were based on the “Questions to Ask” pamphlet; and recommendations are set out in section 5 of this report.

A search on skills assessment/job profiling tools reveals that there are many products and services on the market that assess a workers’ skills. Products can generally be clustered into ones that address what could be described as technical skills (computer competencies, for example) and tools that assess employability skills (basis reading, writing, communication, etc). Given the range of consumers of such products and services it is not surprising that there is range of tools available. As consumers’ needs become more specific, the task of narrowing the selection becomes one of choosing among a smaller number of products and services that may meet some needs, while not meeting others.

In selecting a tool for the Tourism Standards Consortium (Western Canada) Inc. the following criteria were used:

- Tools should be flexible enough to be used by small to medium sized tourism firms – fewer than 100 employees;
- Applicable to all parts of the sector;
- Cost should be a consideration (there are budget limitations for purchase of tools);
Product must be adaptable;
Product must be stand alone (operators can implement on their own);
Accessible.

This is a difficult task. No one tool meets all of the above criteria. The more criteria one has, the narrower the range of services becomes. As cost becomes a factor, products are dropped. When we add the issue of adaptability and that a product must stand alone, we narrow the potential candidates even further.

We have been able to narrow the search to three tools, but again, these would likely need to be modified. The considerations of cost and access, for example, narrow the field considerably. Many products and services require several days of on-site consultants, which drives the cost of implementation up. The issue of access thus becomes an important criteria closely linked to cost as there are travel considerations in bringing the consultants in, and depending on location of operator, access can become a serious cost impediment. Technological considerations are also important as it relates to access. Most recently, there has been an increase in the both the volume and quality of computer-based applications. Use of these tools of course, will be limited to access to a computer and modem.

The greatest difficulty we experienced in narrowing the search was the range of users for which the council would like to use a single tool. Not knowing exactly what skills are of interest makes narrowing the search arbitrary. The recommended process in securing skills assessment/job profiling tools is first and foremost to know what competencies –skills, knowledge, and abilities – that are to be assessed. Given the range of potential needs within firms across your industry, it was difficult to anticipate which skills would be of interest. As such, we have limited our focus to workplace competencies or employability skills.

A further consideration was the practical application issue. From an employer’s perspective, we anticipated that there might be a need to identify key competencies required in staff positions. As such, we have recommended a tool that profiles jobs. This will be useful to employers as they assess workers skills against competencies required in a position.

Having said this, the elements necessary to shape a “work skills analysis tool” specific to the tourism industry are in place.

- Entry Level Skills Workbook from Canadian Tourism Human ResourceCouncil (CTHRC) (info available at http://www.cthrc.ca/english/career/career/career.html)
- Professional Certification Profiles for 20 occupations in the tourism industry from CTHRC
- Workbooks, trainer’s guides and training resources for eight tourism sectors from CTHRC
  [http://www.cthrc.ca/english/training/index.html](http://www.cthrc.ca/english/training/index.html)
- National Occupational Standards for 34 tourism occupations

What appears to be missing is a diagnostic or assessment tool that is (1) based on all of the above profiles and (2) able to produce a skills gap analysis.
5. RECOMMENDED TOOLS AND PROCESSES

The research was intended to provide the TSC with information that could be used for immediate development or adaptation of situation analysis and needs assessment tools to be used by industry operators in (1) analyzing the current situation in their operations; (2) identifying the gap in performance that training might reduce; and (3) identifying their training needs.

Emphasis has been placed on immediate use and/or ease of adaptability. Therefore, preference has been given, in this order and based on the ease (independence) of use and immediacy of results to:

1. interactive tools
2. tools (checklists and worksheets)
3. step-by-step processes and conceptual frameworks
4. professional advice and academic research

5.1. For Situational Analysis

On the basis of the criteria set out above, and in comparison to other tools and processes, FuturEd commends the following to the TSC.

5.1.1. For strategic planning


5.1.2. For product development and innovation

♦ *Innovating for Success: the Four Ds of Innovation* -- a non-interactive tool/process including four steps (define, design, develop and deploy) from Industry Canada (Contact! The Canadian Management Network) [http://strategis.ic.gc.ca/SSG/mi01461e.html](http://strategis.ic.gc.ca/SSG/mi01461e.html)

**5.1.3. For market and market development**

♦ *Your Small-Business Marketing Tool* -- a partly interactive tool at [http://strategis.ic.gc.ca/SSG/mi02599e.html](http://strategis.ic.gc.ca/SSG/mi02599e.html) - *brain* which includes:
  ♦ brainstorming (process)
  ♦ plan framework (tool)
  ♦ priority action (interactive tool)
  ♦ marketing agenda (tool)

♦ *Interactive Business Planner* -- an interactive tool for creating a total business plan, from Canada/British Columbia Business Service Center [http://strategis.ic.gc.ca/SSG/mi04941e.html](http://strategis.ic.gc.ca/SSG/mi04941e.html)

**5.1.4. For export planning**

♦ *Are You Ready to Step Onto the World Stage?* – an interactive tool from Industry Canada and DFAIT at [strategis.ic.gc.ca/SSG/sc01210e.html](http://strategis.ic.gc.ca/SSG/sc01210e.html) - are including:
  ♦ Setting the Stage
  ♦ Assessing Export Readiness
  ♦ Acquiring Export Skills
  ♦ Revisiting the Business Plan
  ♦ Developing the Export Plan
  ♦ Researching the Market [strategis.ic.gc.ca/SSG/sc01308e.html](http://strategis.ic.gc.ca/SSG/sc01308e.html)
  ♦ Creating a Marketing Plan
  ♦ Financing and Insurance

♦ *What’s Your Competitive Intelligence Quotient (CIQ)?* (Calof, 1998) a partly interactive tool to assess international information gathering strategies at [strategis.ic.gc.ca.80/SSG/mi04122e.html](http://strategis.ic.gc.ca.80/SSG/mi04122e.html)
5.2. For Organizational Analysis

♦ *How Sound Are Your Management Practices?* from Atlantic Canada Opportunities Agency (ACOA) [http://www.acoa.ca/english/frameset_main.html](http://www.acoa.ca/english/frameset_main.html) including interactive questionnaires for:
  ♦ Strategic Planning
  ♦ Marketing
  ♦ Human Resources
  ♦ Operations
  ♦ Finance and Accounting
  ♦ Information Management

♦ *Skills Need Assessment Diagnostic Tool*, an interactive tool from Industry Canada (Steps to Competitiveness) [strategis.ic.gc.ca/SSG/sv00061e.html](http://strategis.ic.gc.ca/SSG/sv00061e.html) including modules for:
  ♦ strategic and business planning
  ♦ sales and marketing
  ♦ financial management
  ♦ human resources management
  ♦ business operations
  ♦ technology
  ♦ competitive intelligence
  ♦ strategic alliances and partnering


♦ *Business Forms*, tools to download/print from Quicken Small Business [itest.quicken.com/small_business/cch/tools/contents](http://itest.quicken.com/small_business/cch/tools/contents) in the areas of:
  ♦ business finance
  ♦ compensation and benefits
  ♦ marketing
  ♦ starting a business
  ♦ vehicles and equipment
5.3. For Human Resources Needs Analysis

- **Human Resource Planning**, an interactive set of tools from Industry Canada (Steps to Competitiveness) [http://strategis.ic.gc.ca/SSG/sv00014e.html](http://strategis.ic.gc.ca/SSG/sv00014e.html) including:
  - human resources diagnostic (surplus / gaps)
  - recruitment
  - employee orientation
  - employee communication
  - performance appraisal
  - job definition
  - training and development
  - compensation and benefits
  - employee relations
  - health and safety

- **Human Resources Management** – an interactive tool to determine if human resources are managed properly, from Industry Canada (Steps to Competitiveness) [http://strategis.ic.gc.ca/cgi-bin/bps/steps?file=que5e.txt](http://strategis.ic.gc.ca/cgi-bin/bps/steps?file=que5e.txt)


- **Business Forms** tools to download/print) from Quicken Small Business [itest.quicken.com/small_business/cch/tools/contents](http://itest.quicken.com/small_business/cch/tools/contents) in the areas of:
  - employee management
  - firing and termination
  - recruiting and hiring
  - worker safety

- **Re-tooling Your Employees for Change** (Simpson, 1997; Human Resource Systems Group) [strategis.ic.gc.ca:80/SSG/mi04644e.html](http://strategis.ic.gc.ca:80/SSG/mi04644e.html) a process / set of questions to make sure of fit between employees and organizational goals, especially for the future


5.4. For Training Needs Analysis

What follows is a brief overview of the three products that are being recommended.

5.4.1. ADVANCE SKILL COMMAND,
   Advance Educational Spectrums, Lake Park, MN

This individual skill assessment tool is based on the US SCANS skills (See Appendix B-1) which cover basic employability skills under two headings: Foundation Skills and Workplace Competencies (technical skills are not assessed). Clients determine and input their level of proficiency for each skill by choosing the closest match from a list of options. The program then identifies 5 levels of competency in each of the 37 skill areas. Results are immediately available. Reports are easily generated, use non-technical language and can be configured in several ways, providing the client with individual worker skill assessments, team profiles, training needs, etc. The assessments are applicable to employees ranging from entry-level to advanced and can be adapted to the Canadian labour market. It is easily updated, making this a “living” tool. This product is available in English only.

The Advance Skill Command program is a Windows based application which requires Windows '95 or higher to run. The complete program requires two steps: the development of job profiles and the assessment of worker skills. It takes approximately 45 minutes to 1 hour to complete the skill assessment for each job profile. The program then merges the skills assessed with standards that have been developed for each profile and training gaps are identified. A pre-loaded, standard set of job profiles is available for purchase. There is some training required to install and operate this program.

5.4.2. WORKPLACE SUCCESS SKILLS SYSTEM,
   Learning Resources Inc., Stamford, CT

This is a SCANS based, video delivered system that employs behaviourally based assessments of employability skills. Skills assessed are relevant to the Canadian labour market, and focus on pre-supervisory or entry-level positions (refer to Appendix B-2 for details on the 18 competencies measured by WSS). People being assessed watch a video where job related scenarios are acted out. At various points throughout, the video stops and clients are asked to select their response from a multiple-choice format. It takes approximately 2.5 hours to complete all 5 sections of the video.

Answers are marked on an answer sheet and are later entered into a computer with a modem. This information is transferred to LRI, who immediately (via modem) transmit computer “Feedback Reports” that detail the results in three major sections: 1) Skill Ranking; 2) Skill and Task Analysis, and 3) Performance Development Strategies. The reports are easy to read and are well laid out, but there is no information on the process for scoring assessment results.

There is an optional Basic Skills Section measuring reading and math skills, which employs a paper and pencil format. Additional Video Assessment Programs, which cover specific careers
such as Sales, Supervision, Customer Service, Office Worker Skills and Supermarket Service and Sales, are also available.

Reading ability does not influence the measurement of key competencies with a video delivered system, however, the person being assessed should have a good command of the English language to successfully interpret the scenarios presented. The program is also available in Spanish.

5.4.3. WORK PROFILING SYSTEM, Saville and Holdsworth Ltd., Toronto, ON

The Work Profiling System Person Specification Report identifies the most job relevant competencies based upon an analysis of the tasks, activities and work context that comprise a job. Skills assessed focus more on personality or behaviour types vs. employability. The Personality Profile is based on the Concept Model of the Occupational Personality Questionnaire (OPQ), (Refer to Appendix B-3). Assessments describe skills in 3 major areas: Relationships with Others, Thinking Styles and Feelings and Emotions. The product is relevant to any labour market or industry.

This is a computer-based application, which is ideally suited to a dedicated computer, but can be configured to run over a network of PC’s. It is currently available in 15 different languages. It is easy to use, even for those unfamiliar with computers. The reporting system is extensive; reports are generated using Microsoft Word and can be updated as required. Reports can match people’s skills to different jobs, assist in selecting job incumbents, used for training development planning, performance assessments, job evaluations, etc.
6. OBSERVATIONS AND RECOMMENDATIONS FOR NEXT STEPS

The four concepts that have been researched here for tools and processes -- situational, organizational, human resources, and training needs analysis -- are complex and multifaceted. However, the SME tourism operator doesn’t want to hear that. S/he needs tools and processes to make these analyses look less formidable.

A vast number of tools and processes exist, none of them, however, tailored to the SME tourism operator. That may not be important, given that there is wide variety in tourism operations.

Recommendation 1:

With regard to tools/processes for situational, organizational and human resources needs analysis, FuturEd recommends two options for TSC consideration.

   Option 1:

Rely on the “Steps to Competitiveness” web site from Industry Canada. It is interactive, free, current, complete and extremely well done. To tailor it to the sector:

   ♦ Some enhancements specific to tourism and SMEs could be added by the TSC.
   ♦ A library of additional resources could be appended, e.g., tourism research websites.

This could be viewed as relatively prescriptive as it wouldn’t provide a sweeping variety of tools.

   Option 2:

Compile the best of all the tools -- i.e., those in section 5 of this report -- into an electronic handbook. This would allow for variety in tools and processes. It would, however, be more costly and would require continual upgrading as web sites changed.

In either case, the TSC should mine the resources in Appendix A for planning and ROI tools.

Recommendation 2:

With regard to training needs analysis, FuturEd recommends that TSC consider developing its own tools using the existing occupational skills profiles.

FuturEd would be pleased to assist with these processes in the future.
Appendix A

Situational, Organizational and Human Resources Tools

1. SITUATIONAL ANALYSIS

1.1. Interactive Tools

1.1.1. *Strategic Planning* from Industry Canada at [http://strategis.ic.gc.ca/SSG/sv00053e.html](http://strategis.ic.gc.ca/SSG/sv00053e.html) including:

1.1.2. *Strategic Planning* (Industry Canada) [http://strategis.ic.gc.ca/cgi-bin/bps/steps?file=que1e.txt](http://strategis.ic.gc.ca/cgi-bin/bps/steps?file=que1e.txt)


1.1.4. *Competitive Intelligence* [http://strategis.ic.gc.ca/cgi-bin/bps/steps?file=que7e.txt](http://strategis.ic.gc.ca/cgi-bin/bps/steps?file=que7e.txt)

1.1.5. *Priority Action* from FORD-Q [http://strategis.ic.gc.ca/SSG/mi02599e.html](http://strategis.ic.gc.ca/SSG/mi02599e.html) - priority

1.1.6. *Are You Ready to Step Onto the World Stage?* [http://strategis.ic.gc.ca/SSG/sc01210e.html](http://strategis.ic.gc.ca/SSG/sc01210e.html) - are including:
- Setting the Stage
- Assessing Export Readiness
- Acquiring Export Skills
- Revisiting the Business Plan
- Developing the Export Plan
- Researching the Market [http://strategis.ic.gc.ca/SSG/sc01308e.thml](http://strategis.ic.gc.ca/SSG/sc01308e.thml)
- Creating a Marketing Plan
- Financing and Insurance

1.1.7. *Your Small-Business Marketing Tool* [http://strategis.ic.gc.ca/SSG/mi02599e.html](http://strategis.ic.gc.ca/SSG/mi02599e.html) - brain including:
- brainstorming (process)
- plan framework (tool)
- priority action (interactive tool)
- marketing agenda (tool)


1.1.10. The CBNC Self Evaluation Workbook: Warm up to business networks
http://strategis.ic.gc.ca/SSG/mi02204e.html - situation
including:
♦ entrepreneur success and failure
♦ corporate values
♦ competitive situation
♦ identifying areas of cooperation

1.2. Tools

1.2.1. Vision And Planning: The Future Of Your Business
strategis.ic.gc.ca:80/SSG/mi02676e.html

1.2.2. Innovating for Success: the Four Ds of Innovation
http://strategis.ic.gc.ca/SSG/mi01461e.html

1.2.3. What’s Your Competitive Intelligence Quotient (CIQ)? (Calof, 1998)
strategis.ic.gc.ca:80/SSG/mi04122e.html

1.2.4. E-SWOT Analysis http://www.lowe.org/data/2/2758.txt

1.2.5. Taking The Strategic Approach from the UK Department of Trade and Industry
dtiinfo1.dti.gov.uk/mbp/bpgt/m9fa35001/m9fa350013.html - toc_7

1.2.6. Brainstorming from FORD-Q at http://strategis.ic.gc.ca/SSG/mi02599e.html - brain

1.2.7. Diagnostics and Benchmarking Tools from Industry Canada
strategis.ic.gc.ca/sc_mangb/strategy/forms/eindex.html

1.2.8. Goal Analysis Tool from ASTD mime1.marc.gatech.edu/MM_Tools/GAT.html

1.2.9. Due Diligence Checklist (Combs and Associates)
http://www.combsinc.com/diligent.htm

1.2.10. trade/exporting and international marketing advice from DFAIT
♦ Export Preparation at http://exportsource.gc.ca/nonframe/engdoc/1.2.3.htm
♦ Export Readiness at http://strategis.ic.gc.ca/SSG/sc01210e.html - are
1.3. Processes

www.strategis.ic.gc.ca:80/SSG/mi06460e.html (the steps to creating a perpetual strategy process to use “competitive intelligence”)

1.3.2. examples of tourism studies from Alberta http://www.gov.ab.ca/edt/tda/tda.htm

1.3.3. Market Feasibility (part of Manufacturing Business Plan from Manitoba Industry, Trade and Tourism) http://strategis.ic.gc.ca/SSG/mi03771e.html - market


1.3.5. Researching Your Market (Online Small Business Workshop, BC)
http://www.sb.gov.bc.ca/smallbus/workshop/research.html

1.3.6. Competitive Analysis (Entrepreneur Magazine)

1.4. Advice

1.4.1. The Case for Strategic Thinking (Sauutari, 1993)
strategis.ic.gc.ca/SSG/bs00066e.html (explores the ingredients considered necessary to implement a strategic plan)

1.4.2. Competitive Intelligence Handbook from Industry Canada
strategis.ic.gc.ca:80/SSG/mi03986e.html (provides an overview of how useful information is gathered and where it is to be found)

1.4.3. A list of detailed information about Competitive Intelligence (e.g., market share assessments, assessment of products and services) from Contact! The Canadian Management Network
www.strategis.ic.gc.ca:80/sc_mangb/contact/resourc1/engdoc/99c.html

1.4.4. Michael Porter On How To Marry Strategy and Operational Effectiveness
http://www.best-in-class.com/research/bestpracticesspotlights/porter.htm

1.4.5. Tourism Development Agency (Alberta) http://www.gov.ab.ca/edt/tda/index.html

1.4.6. Goals for Product Development (Entrepreneur Magazine)
http://www.entrepreneurmag.com/page.hts?N=875&Ad=D

1.4.7. Design and Business Performance (UK Department of Trade and Industry)
dtiinfo1.dti.gov.uk/mpb/bpgt/m9fa350011.html

1.4.8. Diagnostics and Benchmarking Tools (synopsis of 92 for hire/purchase)
http://strategis.ic.gc.ca/sc_mangb/strategy/engdoc/bmarking.html

1.4.9. Continuous Improvement Process strategis.ic.gc.ca:80/SSG/mi02665e.html
1.5. Tourism Information

1.5.1. *World Trends Hospitality and Tourism Abstracts* http://www.anbar.co.uk/products/wha.htm


1.5.3. *International Tourism Reports* (available for purchase from Travel and Tourism Intelligence) info at http://www.t-ti.com/pub_inttourep.htm

1.5.4. *Travel and Tourism OneSearch* at open.academic.n2k.com/s_msel3.htm

1.5.5. *Tourism and Information Technology* http://www.tourism.uiuc.edu/itworkshop98/presentation/it03/outlinc.htm


1.5.7. *Canadian Tourism Research Institute* of the Conference Board of Canada at www2.conferenceboard.ca/ctri

1.5.8. *Canadian Tourism Exchange* at http://www.ctc-ctx.com/ctc/biz_centre/Index.cfm (membership required)

1.5.9. *Going International* (related programs/services) http://www.wd.gc.ca/eng/content/inter/xindex.html

1.5.10. *Canadian Rural Information Services: Rural Tourism Pathfinder* from Agriculture and Agri-Food Canada http://aceis.agr.ca/cris/tourism_e/webpgct.html

♦ books on tourism http://aceis.agr.ca/cris/tourism_e/webpgct.html
♦ provincial tourism departments and agencies http://aceis.agr.ca/cris/tourism_e/webpg5a.html

2. ORGANIZATIONAL ANALYSIS

2.1. Interactive Tools


2.1.4. *Managing Time and Resources* (quiz from American Express Small Business Exchange)
http://www6.americanexpress.com/smallbusiness/resources/articles/time_management.asp?aeexp_nav=sbs_it_time

2.1.5. *How Sound Are Your Management Practices?* from ACOA
http://www.acoa.ca/english/frameset_main.html including questionnaires for:
♦ Strategic Planning
♦ Marketing
♦ Human Resources
♦ Operations
♦ Finance and Accounting
♦ Information Management

2.1.6. *Interactive Business Planner* (for creating a business plan) (Canada/British Columbia Business Service Center) http://strategis.ic.gc.ca/SSG/mi04941e.html

2.2. Tools

2.2.1. books, videos, audios, software and CDs (26 pages!) for sale from the Entrepreneurship Institute of Canada http://www.entinst.ca/prod05.html - *BusinessPlanning* on 30 topics, e.g., advertising, incorporating, sales, time management


2.2.3. *Small Business Owner/Operator Competency Guidelines* (checklist of skills) from Sector Councils’ Steering Committee http://www.councils.org/small_business_operator/index.html

2.2.4. *The Business Plan* from ACOA http://www.acoa.ca/english/frameset_main.html


2.2.7. Analysis Tools (large variety) from ASTD
   mime1.marc.gatech.edu/MM_Tools/analysis.html

2.2.8. Evaluation tools (large variety)
   http://www.entrepreneurmag.com/formnet/EVALUATE/EVAL0003.PDF

2.2.9. Defining Service (Belilos, 1997; CHIC Hospitality Consulting Services)
   http://strategis.ic.gc.ca/SSG/mi04183e.html

2.2.10. Service Business Plan (Manitoba Industry, Trade and Tourism)
   http://strategis.ic.gc.ca/SSG/mi02961e.html including:
   ♦ Assessment of Personal Finances (worksheet)
   ♦ Personal Skills and Knowledge (inventory)

2.2.11. Cost Estimate Guide Sheet (Worksheets part of Manufacturing Business Plan
from Manitoba Industry, Trade and Tourism)
   http://strategis.ic.gc.ca/SSG/mi03777e.html - item1

   http://strategis.ic.gc.ca/SSG/mi037431e.html

2.2.13. Business Forms (to download/print) from Quicken Small Business
   itest.quicken.com/small_business/cch/tools/contents in the areas of:
   ♦ business finance
   ♦ compensation and benefits
   ♦ marketing
   ♦ starting a business
   ♦ vehicles and equipment

2.2.14. Getting Started (Business Owner’s Handbook from Quicken) at
   itest.quicken.com/small_business/cch/text/?article=P01_4000

2.3. Processes

2.3.1. Developing Your Corporate Identity: An Essential Tool for the Growing Business
   from Young Entrepreneurs Association of Ontario
   www.strategis.ic.gc.ca:80/SSG/mi04431e.html

2.3.2. Find the Right Words to Describe Your Business from American Express Small Business Exchange at

2.3.3. Starting a Business (Communication – Quebec, 1998)
   http://strategis.ic.gc.ca/SSG/mi05384e.html

2.3.4. The Marketing Audit (Tri-Media Marketing, 1997)
   http://strategis.ic.gc.ca/SSG/mi03709e.html

2.3.5. Preparing a Business Plan (Online Small Business Workshop Session 4)
   http://www.sb.gov.bc.ca/smallbus/workshop/busplan.html
2.3.6. Start Up Checklist (Online Small Business Workshop Session 5)
http://www.sb.gov.bc.ca/smallbus/workshop/checklist.html

2.3.7. Essential Elements of a Business Plan
http://strategis.ic.gc.ca/SSG/sc01212e.html - essential

2.3.8. Writing a Business Plan: Financial Components (Entrepreneur Magazine)
http://www.entrepreneurmag.com/page.pts?N=876

2.3.9. Preparing a Business Plan (BDBC)
strategis.ic.gc.ca:80/SSG/mi01164e.html

2.4. Advice

2.4.1. The Quality Management Principles
qmp.wineasy.se/principles.html

2.4.2. Setting Personal Objectives for Your Business from Industry Canada
strategis.ic.gc.ca/SSG/mi06210e.html

2.4.3. The Tourism Company (consulting service)

2.4.4. Small Business Startup Issues (a list of tools and processes) from American Express Small Business Exchange

2.4.5. Marketing (a list of tools and processes) from American Express Small Business Exchange
http://www6.americanexpress.com/smallbusiness/segments/marketing.asp

2.4.6. Managing Clients and Customers (a list of tools and processes) from American Express Small Business Exchange

2.4.7. Virtual University for Small and Medium Sized Enterprises
http://www.vsume.org/

2.4.8. Small Business Guides (booklets to download/print) from Alberta Economic Development and Tourism
http://www.albertafirst.com/scripts/sm_buss.asp?item_id=6&subitem_id=15&ssitem_id=13&uid= including:
♦ Starting a Small Business
♦ Starting a Home-Based Business
♦ Marketing for Small Business
♦ Managing a Small Business
♦ Recordkeeping for Small Business
♦ Financial Planning for Small Business

2.4.9. Business assistance websites from Canadian Rural Information Services: Rural Tourism Pathfinder from Agriculture and Agri-Food Canada
http://aceis.agr.ca/cris/tourism_e/webpg4a.html
2.4.10. courses/continuing education from Women and Rural Economic Development at http://www.wred.org/


2.4.15. Business Development Bank of Canada (tool kits to order) http://strategis.ic.gc.ca/SSG/mi01194e.html - Publications

3. HUMAN RESOURCES ANALYSIS

3.1. Interactive Tools


3.1.2. Human Resources Management http://strategis.ic.gc.ca/cgi-bin/bps/steps?file=que5e.txt

3.1.3. Explanation on the Human Resources Gap Analysis from Industry Canada / Strategis strategis.ic.gc.ca/SSG/sv00013e.html


3.1.5. Projected Staffing Schedule from Quicken Small Business itest.quicken.com/small_business/cch/tools/?article=staff_m

3.2. Tools


3.2.2. Evaluation Tools (10 tools to download/print; could be used to evaluate effects of training) mime1.marc.gatech.edu/MM_Tools/evaluation.html
3.2.3. *Business Forms* (to download/print) from Quicken Small Business [itest.quicken.com/small_business/cch/tools/contents](itest.quicken.com/small_business/cch/tools/contents) in the areas of:
- employee management
- firing and termination
- recruiting and hiring
- worker safety

3.3. Processes

3.3.1. *Re-tooling Your Employees for Change* (Simpson, 1997; Human Resource Systems Group) [strategis.ic.gc.ca:80/SSG/mi04644e.html](strategis.ic.gc.ca:80/SSG/mi04644e.html) (questions to make sure of fit between employees and organizational goals, especially for the future)


3.4. Advice


3.4.2. *Understanding Employee Drives and Motivations* (Belilos, 1997; CHIC Hospitality Consulting Services) [strategis.ic.gc.ca:80/SSG/mi04188e.html](strategis.ic.gc.ca:80/SSG/mi04188e.html)


3.4.5. Employment Issues (from Quicken Small Business) [itest.quicken.com/small_business/cch/text/?article=P01_6350](itest.quicken.com/small_business/cch/text/?article=P01_6350)
4. TRAINING NEEDS ANALYSIS

4.1. Interactive tools

4.2. Tools

4.2.1. Job / Content Analysis Tool  from American Society for Training and Development  
mime1.marc.gatech.edu/MM_Tools/JCAT.html

4.2.2. Individual Development Plan for Building HPI Competencies from ASTD  
http://www.astd.org/CMS/templates/template_1.html?acticleid=29782

4.2.3. Needs Assessment Matrix from ASTD  
mime1.marc.gatech.edu/MM_Tools/NAM.html

4.2.4. Needs Focus Group Protocol from ASTD  
mime1.marc.gatech.edu/MM_Tools/NFGP.html

4.2.5. Needs Questionnaire from ASTD  
mime1.marc.gatech.edu/MM_Tools/NQ.html

4.2.6. Entry Level Skills Workbook from Canadian Tourism Human Resources Council  
(info available at http://www.cthrc.ca/english/career/career/career.html)

4.2.7. Professional Certification Profiles for 20 occupations in the tourism industry from  
CTHRC  http://www.cthrc.ca/english/certif/index.html

4.2.8. Workbooks, trainer’s guides and training resources for eight tourism sectors from  
CTHRC  http://www.cthrc.ca/english/training/index.html

4.2.9. National Occupational Standards for 34 tourism occupations  
http://www.cthrc.ca/english/standards/index.html

4.2.10. Essential Skills Profiles for many tourism occupations  

4.3. Processes

4.3.1. Demystifying Training Design: Writing Training and Learning Objectives (Belilos, 1998; CHIC Hospitality Consulting Services)  
strategis.ic.gc.ca:80/SSG/mi004187e.html

4.3.2. Beyond Training: Training and Development – Achieving Results by Focusing on the Human Factor (Belilos, 1997; CHIC Hospitality Consulting Services)  
strategis.ic.gc.ca:80/SSG/mi004259e.html

4.3.3. Are Your Competencies Defensible? (Simpson, 1999; Human Resource Systems Group)  
strategis.ic.gc.ca:80/SSG/mi06540e.html
4.3.4. **Professional Certification Steps** from CTHRC
http://www.cthrc.ca/english/certif/index.html

4.4. **Advice**

4.4.1. **Five Things To Remember When Deciding How To Train Your Employees** (Ragan Communications, 1997) strategis.ic.gc.ca:80/SSG/mi03737e.html

4.4.2. **Human resources studies for Canadian Accommodation Industry and Travel Industry** http://www.hrdc-drhc.gc.ca/hrdc/hrp-prh/ssl-des/pubs_e.html

4.5. **Services**

4.5.1. Atlantic Tourism Hospitality Institute

5. **OMNIBUS WEBSITES**

5.1. **Steps to Competitiveness** (Industry Canada)
strategis.ic.gc.ca/sc_indps/service/engdoc/steps.html

5.2. Quicken Small Business quicken.webcrawler.com/small_business/

5.3. Canada/British Columbia Business Service Centre
http://www.sb.gov.bc.ca/smallbus/sitemap.htm

5.4. **Contact! The Canadian Management Network** library
http://strategis.ic.gc.ca/SSG/mi03933e.html - library

5.5. An entire set of business forms to download from Entrepreneur Magazine
http://www.entrepreneurmag.com/formnet/

6. **MISCELLANEOUS GOOD STUFF**

6.1. **Year 2000: Technology Checklist for Small Business** from Canadian Federation of Independent Business
http://www.cfib.ca/research/businfo/din0261.asp

6.2. **Small Business Primer Business** from Canadian Federation of Independent Business
http://www.cfib.ca/research/reprots/primer98_e.asp

6.3. **The Big Idea for Small Business** from the Royal Bank
### Appendix B-1: The SCANS* Skills

<table>
<thead>
<tr>
<th>Foundation Skills</th>
<th>Workplace Competencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>F1 Reading</td>
<td>C1 Manages Time</td>
</tr>
<tr>
<td>F2 Writing</td>
<td>C2 Manages Money</td>
</tr>
<tr>
<td>F3 Arithmetic</td>
<td>C3 Manages Materials</td>
</tr>
<tr>
<td>F4 Mathematics</td>
<td>C4 Manages Human Resources</td>
</tr>
<tr>
<td>F5 Listening</td>
<td>C5 Acquires Information</td>
</tr>
<tr>
<td>F6 Speaking</td>
<td>C6 Organizes &amp; Maintains Information</td>
</tr>
<tr>
<td>F7 Creative Thinking</td>
<td>C7 Interprets Information</td>
</tr>
<tr>
<td>F8 Decision Making</td>
<td>C8 Uses Computers to process</td>
</tr>
<tr>
<td>F9 Problem Solving</td>
<td>C9 Participates as a team member</td>
</tr>
<tr>
<td>F10 Visualization</td>
<td>C10 Teaches others</td>
</tr>
<tr>
<td>F11 Knows how to learn</td>
<td>C11 Serves clients / customers</td>
</tr>
<tr>
<td>F12 Reasoning</td>
<td>C12 Exhibits leadership</td>
</tr>
<tr>
<td>F13 Responsibility</td>
<td>C13 Negotiates with others</td>
</tr>
<tr>
<td>F14 Self Worth</td>
<td>C14 Works with diversity</td>
</tr>
<tr>
<td>F15 Sociability</td>
<td>C15 Understands systems</td>
</tr>
<tr>
<td>F16 Self Management</td>
<td>C16 Monitors systems</td>
</tr>
<tr>
<td>F17 Honesty – Integrity</td>
<td>C17 Improves system design</td>
</tr>
<tr>
<td></td>
<td>C18 Selects technology</td>
</tr>
<tr>
<td></td>
<td>C19 Applies technology</td>
</tr>
<tr>
<td></td>
<td>C20 Maintains technology</td>
</tr>
</tbody>
</table>

*SCANS: U.S. Secretary of Labour’s Commission on Achieving Necessary Skills*
Appendix B-2

Competencies Measured by Workplace Success Skills (WSS)

WSS measures the following SCANS-based employability skills which employers have identified as critical for success in pre-supervisory, entry-level positions in service and manufacturing organizations:

**Interacting with Others**
1. Helps resolve differences of opinion or interpersonal conflicts among (e.g., takes action to stop bickering, encourages cooperation).
2. Interacts with others in a polite and effective manner (e.g., encourages cooperation, responds to others in a non-defensive manner, avoids personal criticisms).
3. Assists those with less experience (e.g., helps people learn new tasks).
4. Encourages others to maintain good work habits (e.g., comply with safe work practices, come to work on time, work productively).
5. Deals effectively with angry or demanding people (e.g., avoids becoming angry, acts as a concerned peacekeeper, keeps disagreements on a constructive level).
6. Demonstrates a concern about problems and issues voiced by others (e.g., avoids an 'it's not my job' position, encourages others to provide feedback on their own performance and/or ways they could improve).
7. Initiates action on problems: doesn't wait for someone else to do something.
8. Provides colleagues with constructive guidance (e.g., offers others suggestions about how to improve quality or productivity).
9. Acknowledges the positive work efforts and accomplishments of others (e.g., thanks others for help or assistance given, notices and mentions jobs done well by others).
10. Encourages others to do high quality work (e.g., sets high personal standards, discusses the importance of quality with others, encourages taking the time to do the job right the first time).
11. Asks others for their views and opinions (e.g., attempts to involve others in problem-solving activities, bounces ideas off of people and asks for feedback).
12. Identifies problems and means of dealing with them (e.g., offers good suggestions for ways to improve quality, productivity and about how to handle unexpected problems).

**Listening**
13. Clearly understands and recalls oral instructions (e.g., understands instructions, implied meanings, remembers prior conversations accurately).

**Structuring Work Activities**
14. Determines priorities (e.g., recognizes conflicting priorities, determines best way to schedule activities).
15. Recognizes issues, which she/he should handle versus those to be dealt with by supervisors.
16. Structures own work (e.g., can determine best way to structure and plan a task for completion).

**Trainability**
17. Learns new skills and knowledge (e.g., learns new work procedures quickly, takes on additional responsibilities with minimal training).

**Graphs and Charts**
18. Interprets and applies information found in a chart or table format.
### Appendix B-3:

**OCCUPATIONAL PERSONALITY QUESTIONNAIRE (OPQ)**

*Note: Each skill is ranked as “Essential”, “Important”, or “Relevant”*

<table>
<thead>
<tr>
<th>Low Level of Attribute</th>
<th>High Level of Attribute</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dislikes persuading/negotiating</td>
<td>Can sell and be persuasive</td>
</tr>
<tr>
<td>Prefers others to take control</td>
<td>Prefers to direct or take control</td>
</tr>
<tr>
<td>Accepts instructions, no question</td>
<td>Argues strongly for opinions</td>
</tr>
<tr>
<td>Is quiet and reserved</td>
<td>Is talkative and outgoing</td>
</tr>
<tr>
<td>Prefers to work alone</td>
<td>Likes to work with groups/teams</td>
</tr>
<tr>
<td>(no lower level for this attribute)</td>
<td>Is confident with people</td>
</tr>
<tr>
<td>Is concerned for status</td>
<td>Avoids talking about self</td>
</tr>
<tr>
<td>Decides without consultation</td>
<td>Consults others before deciding</td>
</tr>
<tr>
<td>Tends to disregard people issues</td>
<td>Is empathetic and tolerant</td>
</tr>
<tr>
<td>Avoids practical activities</td>
<td>Enjoys repairing things</td>
</tr>
<tr>
<td>Judges on basis of intuition</td>
<td>Judges on basis of data/logic</td>
</tr>
<tr>
<td>Not concerned with artistic matters</td>
<td>Shows artistic appreciation</td>
</tr>
<tr>
<td>Avoids analyzing others’ behaviour</td>
<td>Likes analyzing others’ behaviour</td>
</tr>
<tr>
<td>Prefers non-traditional work culture</td>
<td>Follows conventional approach</td>
</tr>
<tr>
<td>Seeks little change/variety in work</td>
<td>Seeks change/variety in work</td>
</tr>
<tr>
<td>Avoids theoretical approaches</td>
<td>Enjoys working with theory</td>
</tr>
<tr>
<td>Sticks to prevalent ideas/solutions</td>
<td>Enjoys creating novel solutions</td>
</tr>
<tr>
<td>Operates without pre-planning</td>
<td>Enjoys forming short term plans</td>
</tr>
<tr>
<td>Operates without pre-planning</td>
<td>Enjoys forming long term plans</td>
</tr>
<tr>
<td>Leaves details to others</td>
<td>Is concerned about details</td>
</tr>
<tr>
<td>Leaves routine completion to others</td>
<td>Sees routine tasks through</td>
</tr>
<tr>
<td>Worries about work problems</td>
<td>Can switch off work pressures</td>
</tr>
<tr>
<td>Stays cool at important events</td>
<td>Gets keyed up for big events</td>
</tr>
<tr>
<td>Is sensitive to comments about self</td>
<td>Does not suffer hurt feelings</td>
</tr>
<tr>
<td>Communicates with emotion</td>
<td>Keeps feelings hidden</td>
</tr>
<tr>
<td>Expects the worst to happen</td>
<td>Keeps an optimistic outlook</td>
</tr>
<tr>
<td>Accepts points without question</td>
<td>Critically evaluates ideas</td>
</tr>
<tr>
<td>Copes easily with inactive jobs</td>
<td>Enjoys active jobs/activities</td>
</tr>
<tr>
<td>Compromises without having to win</td>
<td>Likes to compete and win</td>
</tr>
<tr>
<td>Wants security more than success</td>
<td>Is ambitious for success</td>
</tr>
<tr>
<td>Takes time to weight up decisions</td>
<td>Likes to make quick decisions</td>
</tr>
</tbody>
</table>