FuturEd

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.

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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.

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[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

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[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.

	Interactive tools	Tools	Processes	Advice
Situational analysis				
Organizational analysis				
Human resources analysis				
Training needs analysis				

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 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
http://www.cthrc.ca/english/certif/index.html

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

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

Essential Skills Profiles for many tourism occupations http://www.hrdc-drhc.gc.ca/hrib/hrp-prh/skills/profiles.html

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

Strategic Planning – an <u>interactive</u>, 3 step tool with complete instructions, from Industry Canada (Steps to Competitiveness) at http://strategis.ic.gc.ca/SSG/sv00050e.html including forms at http://strategis.ic.gc.ca/pics/sv/ssdc.pdf

Vision And Planning: The Future Of Your Business – a non-interactive tool with forms and instructions, from the Federal Office of Regional Development for Quebec (FORD – Q) strategis.ic.gc.ca:80/SSG/mi02676e.html

5.1.2. For product development and innovation

Product Development: The Way of the Future -- an <u>interactive</u>, 5 step tool with instructions, from the Federal Office of Regional Development for Quebec http://strategis.ic.gc.ca/SSG/mi02675e.html - new

Innovating for Success: the Four Ds of Innovation -- a <u>non-interactive</u> 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

5.1.3. For market and market development

Your Small-Business Marketing Tool -- a <u>partly interactive</u> tool at 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 <u>interactive</u> tool for creating a total business plan, from Canada/British Columbia Business Service Center
http://strategis.ic.gc.ca/SSG/mi04941e.html

5.1.4. For export planning

Are You Ready to Step Onto the World Stage? – an <u>interactive</u> tool from Industry Canada and DFAIT at 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.thml
  Creating a Marketing Plan
  Financing and Insurance

What's Your Competitive Intelligence Quotient (CIQ)? (Calof, 1998) a partly <u>interactive</u> tool to assess international information gathering strategies at
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 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 including modules for:

> strategic and business planning
> sales and marketing
> financial management
> human resources management
> business operations
> technology
> competitive intelligence
> strategic alliances and partnering

Managing Time and Resources, interactive quiz from American Express Small Business Exchange
http://www6.americanexpress.com/smallbusiness/resources/articles/time_management.asp?aexp_nav=sbs_it_time

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

Business Forms, tools 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

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 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

Know Who You Want to Hire – an interactive tool from American Express Small Business Exchange http://www6.americanexpress.com/smallbusiness/resources/tools/hiring/intro.asp?aexp_nav=sbs_it_hiretool

Business Forms tools to download/print) from Quicken Small Business 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 a process / set of questions to make sure of fit between employees and organizational goals, especially for the future

Human Resource Planning and Training Model for Organizations Experiencing Change (Simpson, 1998: Human Resource Systems Group) a process strategis.ic.gc.ca:80/SSG/mi04964e.html

How to Create an Effective Employee Handbook - a process from American Express Small Business Exchange http://www6.americanexpress.com/smallbusiness/resources/managing/emphand.shtml

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 it's 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 including:
forms at http://strategis.ic.gc.ca/pics/sv/ssdc.pdf

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

1.1.3. *Product Development: The Way of the Future*
http://strategis.ic.gc.ca/SSG/mi02675e.html - new

1.1.4. *Competitive Intelligence* 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 - priority

1.1.6. *Are You Ready to Step Onto the World Stage?*
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.thml
Creating a Marketing Plan
Financing and Insurance

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

1.1.8. *Competitive Intelligence Guide* (FULD & company, 1997)
http://strategis.ic.gc.ca/SSG/mi03954e.html

1.1.9. *The Entrepreneur Test*   http://www.liraz.com/webquiz.htm

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
International Marketing Plan at
http://www.infoexport.gc.ca/section2/PEMD_market-e.asp - 6
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

1.3.1. *Perpetual Strategy: A 21st Century Essential* (Kirk Tyson International, 1998) 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

1.3.4. *The Common Sense Guide to Running Your Own Business: Thirteen Ways to Think Really Hard* (Aylen, 1998) http://strategis.ic.gc.ca/SSG/mi06298e.html - one

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) http://www.entrepreneurmag.com/page.hts?N=863&Ad=D

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.g.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/mbp/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

1.5.2. *Tourism Market Trends* from the World Tourism Organization http://www.world-tourism.org/ows-doc/wtopubli/mktrends.htm

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

1.5.6. *Great Tourism Development Links* from Alberta Tourism Development Agency
http://www.gov.ab.ca/edt/tda/great.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/webpg1a.html
provincial tourism departments and agencies
http://aceis.agr.ca/cris/tourism_e/webpg5a.html

2. ORGANIZATIONAL ANALYSIS

2.1. Interactive Tools

2.1.1. *Business Operations* http://strategis.ic.gc.ca/cgi-bin/bps/steps?file=que3e.txt

2.1.2. *What's Your BPQ? (Business Performance Quotient)* (Welford, 1997)
http://strategis.ic.gc.ca/SSG/mi05854e.html

2.1.3. *Creating an Effective Business Plan* from the American Express Small Business Exchange
http://www6.americanexpress.com/smallbusiness/resources/starting/biz_plan/index.shtml?aexp_nav=sbs_it_bizplan

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

2.2.2. *Create Your Marketing Plan* from American Express Small Business Exchange
http://www6.americanexpress.com/smallbusiness/resources/expanding/mktplan/

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

2.2.5. *Your Small-Business Marketing Plan: A Winning Strategic Tool* from Federal Office of Regional Development (Quebec) – FORD-Q http://strategis.ic.gc.ca/cgi-bin/basic/ftgetdoc?table=infoalle&fname=..%2Fauthorse%2Fsgml%2Fdoc%2Fmi02599e.html&ft_cid=381057&headline=Your%20Small-Business%20Marketing%20Plan-A%20Winning%20Strategic%20Tool%20%5C%20Federal%20Office%20of%20Regiona

2.2.6. *Benefits of Having a Business Plan* from Industry Canada
http://strategis.ic.gc.ca/SSG/sc01212e.html - what

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

2.2.12. *Could You Succeed in Small Business: A Reality Check for Small Business
Owners* (HRDC, 1997) 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
http://www6.americanexpress.com/smallbusiness/resources/tips/january-97-
tip.shtml

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.hts?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
http://www6.americanexpress.com/smallbusiness/segments/startup_issues.asp

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
http://www6.americanexpress.com/smallbusiness/segments/managing_clients.asp

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 C*anadian 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/

2.4.11. financial and tax information from Revenue Canada (*Guide for Canadian Small Business*) http://www.rc.gc.ca/E/pub/tg/rc4070ed/rc4070ed.html

2.4.12. Planning Fundamentals (Online Small Business Workshop Session 4) at http://www.sb.gov.bc.ca/smallbus/workshop/whyplan.html

2.4.13. Publications for small business on Canada/BC Business Service Centre web site http://www.sb.gov.bc.ca/smallbus/ministry/minpubs.html

2.4.14. Strategic and Business Planning (list of services/websites) http://strategis.ic.gc.ca/SSG/sv00062e.html

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

3.1.1. Human Resource Planning: Diagnostic from Industry Canada http://strategis.ic.gc.ca/SSG/sv00014e.html

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

3.1.4. Know Who You Want to Hire from American Express Small Business Exchange http://www6.americanexpress.com/smallbusiness/resources/tools/hiring/intro.asp?aexp_nav=sbs_it_hiretool

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

3.2. Tools

3.2.1. Skills Needs Diagnostic Tool http://strategis.ic.gc.ca/SSG/sv00061e.html

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 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 (questions to make
sure of fit between employees and organizational goals, especially for the future)

3.3.2. *Human Resource Planning and Training Model for Organizations Experiencing
Change* (Simpson, 1998: Human Resource Systems Group)
strategis.ic.gc.ca:80/SSG/mi04964e.html

3.3.3. *How to Create an Effective Employee Handbook* from American Express Small
Business Exchange
http://www6.americanexpress.com/smallbusiness/resources/managing/emphand.s
html

3.4. Advice

3.4.1. *Why Plan for Your Human Resources?* (Simpson, 1998; Human Resource
Systems Group) strategis.ic.gc.ca:80/SSG/mi04965e.html

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

3.4.3. International Society for Performance Improvement (info available at
http://www.ispi.org/

3.4.4. Hiring, Firing and Managing Staff (a list of articles and processes) from American
Express Small Business Exchange
http://www6.americanexpress.com/smallbusiness/segments/hiring_firing.asp

3.4.5. Employment Issues (from Quicken Small Business)
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 http://www.hrdc-drhc.gc.ca/hrib/hrp-prh/skills/profiles.html

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/hrib/hrp-prh/ssd-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
http://www.royalbank.com/business/tools/bigidea.html

Appendix B-1: The SCANS* Skills

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

*SCANS:
 U.S. **S**ecretary of Labour's **C**ommission on **A**chieving **N**ecessary **S**kills

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. Recognize 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"

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