

Personnel Plan - Outline

- 1) Description of Management Team**
 - a) Owners and Key Employees**
 - i) Owners and Titles**
 - ii) Key employees and Titles**
 - iii) Team experience**
 - b) Background and Experience (Combined Company Talent Pool)**
 - i) Business experience**
 - ii) Duties** - duties for each title:
- 2) Outside Investors, Directors, and Resource People**
 - a) Outside investors**
 - b) Outside Directors**
 - c) Outside consultants, advisors, or mentors**
- 3) Training and Recruiting Plan**
 - a) Training needs assessment**
 - b) Prioritize training needs -**
 - i) Identify Training Gaps**
 - ii) Training Priorities**
 - c) Training / educational plan**
 - d) Recruitment Plan**
 - i) Employees Needed**
 - (1) Number of Employees**
 - (2) Job titles/ skills**
 - (3) Job Descriptions**
 - (4) Policies and procedure Manual**
 - ii) Sources of Employees**

Indicate the following:

Employee title
Recruitment source/ method
Costs for recruitment
Method for qualification
Costs for qualification
 - iii) New Employee Orientation and Training**

Indicate the following:

Employee title
Training method, duration
Costs for training
Orientation Method
Costs for orientation

Personnel Plan

1) Description of Management Team

a) Owners and Key Employees

- i) **Owners and Titles** - Who are the owners and what are their titles?
- ii) **Key employees and Titles** - Who are the "key employees" and what are their titles? A key employee may be any employee that may be depended upon if the owner falls ill - in some cases this may be a spouse, boyfriend, girlfriend, or relative (even if this person may not be a "formal employee."
- iii) **Team experience** - Have any of these people (in 1a and 1b) worked together in the past?

b) Background and Experience (Combined Company Talent Pool)

- i) **Business experience** - Who has what types of experience? Develop a qualifications brief for each owner and key employee. A qualifications brief concentrates on transferable skills, rather than previous functional job titles. The qualifications brief should concentrate on listing "action verbs" and the way they are applicable to this business venture. For example, "achieved a 250% annual increase in sales." Action verbs become very useful when probing the extent of skills possessed. For example, "What activities did you conduct to achieve the 250% annual sales increase?" The most commonly preferred method to probe is through the (verbal) interview process - at this time owners and key employees may elaborate on how their key skills are transferable to this business, and to what degree they possess the skills. A starter list of action verbs has been developed for your use - please consider this list as a start list and feel free to add to it.

"Action Verbs" Useful in a Qualifications Brief

accomplished	achieved	acquired	acted
adapted	addressed	administered	adopted
advanced	advised	allocated	analyzed
answered	applied	appointed	appraised
apprehended	approved	assembled	assessed
assisted	assured	audited	authored
automated	avoided	awarded	balanced
boosted	bought	budgeted	calculated
carried out	certified	chaired	championed
changed	charted	checked	chose
clarified	classified	coached	collected
communicated	compared	compiled	completed
composed	computed	conceived	concentrated
conceptualized	concluded	conducted	conserved
consolidated	constructed	consulted	contained
contributed	controlled	converted	coordinated
corrected	counseled	created	critiqued

cut	debated	decided	decreased
delegated	delivered	demonstrated	described
designed	determined	developed	devised
diagnosed	directed	discovered	displayed
dissected	disseminated	distinguished	distributed
diversified	drafted	edited	eliminated
employed	enabled	encouraged	endorsed
enforced	engineered	enlisted	epitomized
established	estimated	evaluated	examined
exceeded	executed	exemplified	exhibited
expanded	expedited	experimented	explored
expressed	extracted	fabricated	facilitated
figured	financed	finished	fixed
focused	followed	forecasted	formed
formulated	fought	founded	gained
gave	generated	governed	guaranteed
guided	handled	headed	hired
identified	illustrated	implemented	improved
improvised	increased	influenced	informed
initiated	inspected	installed	instituted
instructed	integrated	interpreted	interviewed
introduced	invented	judged	kept
launched	lectured	led	lowered
made	maintained	managed	manufactured
marketed	mastered	mediated	memorized
met	mobilized	modeled	moderated
modified	monitored	motivated	negotiated
nominated	notified	observed	obtained
offered	opened	operated	organized
originated	overcame	oversaw	participated
perceived	persuaded	picked	planned
predicted	prepared	presented	preserved
prevented	prioritized	processed	procured
produced	programmed	projected	provided
publicized	published	purchased	qualified
questioned	read	realized	received
recognized	recommended	recorded	recovered
recruited	reduced	referred	reinforced
related	removed	repaired	reported
represented	required	researched	responded
restructured	retrenched	retrieved	revealed
revised	rewrote	saved	scheduled
secured	selected	served	set
screened	showed	slashed	sold
solved	specified	stated	streamlined
strengthened	studied	submitted	suggested
summarized	supervised	supported	surpassed
sustained	systematized	tabulated	tailored
targeted	taught	tested	trained
transformed	translated	trimmed	undertook
united	upgraded	utilized	validated
visualized	weighed	worked	wrote

ii) **Duties** - what are the most important duties for each title (1ai, 1aii). At this time, you should begin to match duties with the skills articulated in the qualifications brief.

2) Outside Investors, Directors, and Resource People

a) Outside investors

Who will invest in your company? How much will they invest? Do they expect to have any "say so" in how the business is run?

b) Outside Directors

Any Board of Directors? Why qualified? Function they will serve? Companies may use a Board of Directors in different ways. Some firms select members based upon potential contribution to key areas of the business, while other firms might select a Board based on personal friendships and relationships.

c) Outside Consultants, Advisors, or Mentors

Will you use an accountant, lawyer, banker, broker, or "trusted advisor"? Identify whom you will use or plan to use.

3) Training and Recruiting Plan

a) Training needs assessment

Complete the "Skills Matrix" which follows for owner(s) and key employees (do NOT include outside consultants). Place a number representing the level of learning by each of the skills in the appropriate column possessed by owner or key employees. Please indicate the level where you feel you SHOULD be for each of the skills (minimum of a Level 2), and where you currently are:

Levels of Learning						
	1 = I'm not sure of what I know or I don't know	2 = I know what I don't know	3 = I know it, but need occasional updates	4 = I know it well - I don't need an update		
Skills	Level where I SHOULD be	Level where I am Currently	Owner 2	Owner 3	Emp 1	Emp 2
Company visioning						
Legal Issues						
Intellectual Property						
Marketing Planning						
Product Branding						
Competitive Analysis						
Packaging						
Positioning						
Customer Segmentation						
Sales Projections						
Strategic Planning						

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Skills	Level where I SHOULD be	Level where I am Currently	Owner 2	Owner 3	Emp 1	Emp 2
Sales Systems						
Promotional Systems						
Advertising Methods						
Distribution						
Pricing Strategies						
Analysis of Management Skill Depth						
Training Planning						
Recruitment and Succession Planning						
Operating and Manufacturing Methods						
Appointment Systems						
Master Activity Schedules						
Operating Facilities Planning						
Quality Control Methods						
Inventory Control						
Purchasing Procedures						
Accounting/ Bookkeeping						
Financial Statements and Analysis						

b) Prioritize training needs -

- i) **Identify Training Gaps** - Here we want to identify any gaps between what we know and what we feel we should know. Identify all skill areas where you had a gap - where you rated what you should know as being higher than what you currently know.
- ii) **Training Priorities** - Identify which skills should become your training priorities. Based on the gaps between what you should know and what you currently do know, which skill areas are most applicable to your job and business? List these skill areas as priorities - the training and education plan will address each of these issues. Not all areas with gaps might be considered a priority.

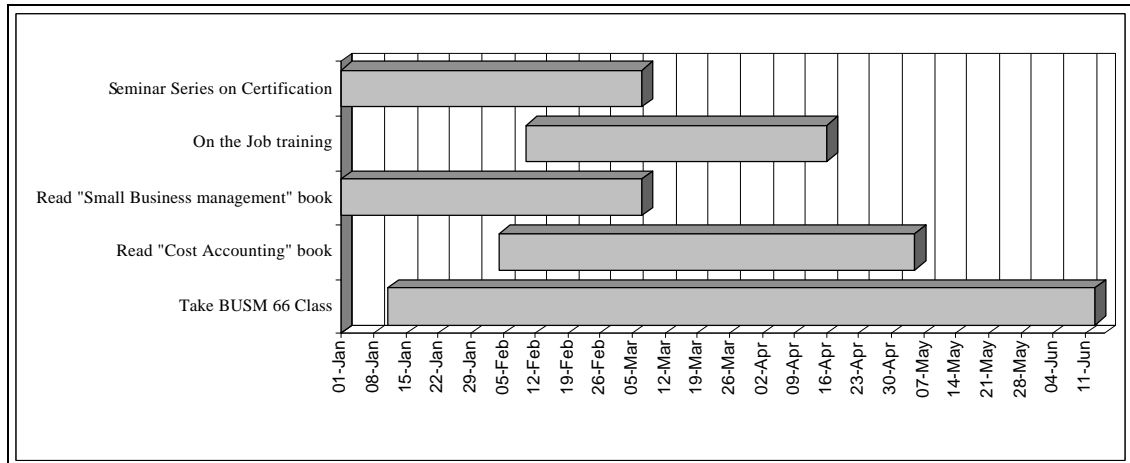
c) Training / educational plan

Develop a training and educational plan for each of your training priorities (as identified above). This professional development plan should be completed for each owner and key employee.

- i) **Training method** - How do you propose to obtain the training (books, college class, video, workshop, etc.) You need to be specific, in terms of book title, specific class title, video name, or workshop topic. The higher the level of learning associated with the training priority, the more specific you'll need to be when specifying training methods. [For example, let's say that marketing planning is one of our priorities. If we are at Level 1, it will be difficult to identify our training method much beyond gathering general information by reading a book (specific title) on marketing. On the other hand, if we are at level 2 we might be much more specific, in that we may want to read a book on market research analysis. If we are at Level 3, we may indicate that we need to attend an annual workshop on market research trends in our industry.]
- ii) **Time commitment** - How much time are you committed to spend on the education process for owner and key employees? Per week? Per month? Is it appropriate to training need?
- iii) **Financial commitment** - How much are you willing to spend on this process? For owner? For key employee? Reimbursements?

Training Method (be specific)	Who	Time	Costs

You may wish to develop a Gantt chart to keep track of time commitments. This type of a chart posts tasks vertically across a horizontal timeline. This structuring device may be extremely helpful when determining how many simultaneous tasks need to be completed. You will be able to plan when you might want to complete your training tasks in a way that does not overload your schedule at any particular point in time. Please take a look at the Gantt chart below - it shows how a series of training tasks might be arranged for a hypothetical person. As emergencies arise, we tend to react to them with immediate attention. Does your schedule allow some time flexibility for emergency situations?



d) Recruitment Plan

- i) **Employees Needed** - Identify what types of employees you have and how many you will need in the foreseeable coming year.
 - (1) **Number** - How many employees do you anticipate you will have in your company? How many vacancies will you need to fill?
 - (2) **Job titles/ skills** - What are the job titles and skills needed for each classification of employee?
 - (3) **Job Descriptions** - Do you have written job descriptions? If not, where can you get examples?
 - (4) **Policies and procedure Manual** - Do you have a policy and procedure manual? If not, will you draft one, or will you hire a firm to do it for you? Where may you go to see an example or get help?
- ii) **Sources of Employees** - Identify how you will recruit to get employees for your company.
 - (1) **Best sources** - What are your best sources, per classification of employee? What methods will you use to attract employees to your firm? Methods might include headhunters (executive recruiters), temporary employment agencies, employment agencies, associations, the Internet, schools, associates, customers, newspapers or others.
 - (2) **Qualification** - How will you pre-qualify or test employees? Examples might include: looking at attendance records, testing, drug testing, interviews (how many), reference checks, portfolios, or skills tests?

(3) **Costs** - What are the costs associated with all of the above?

Employee Title	Recruitment Source/ Method	Costs
Employee Title	Method for Qualification	Costs

iii) **New Employee Orientation and Training** - How will you orient and train new employees? These employees are considered to be different than our "key employees" discussed previously.

(1) **Orientation** - Have you prepared new-employee orientation literature?

Have you proposed an orientation process? What materials, methods and time will be required? Is there a probationary period? How long? What documents will all new hires sign? You'll need to check diligently on your legal requirements as an employer. Will you give employees copies of documents they signed?

(2) **Training** - Will initial employee training be on-the-job, college, association, or other?

(3) **Costs** - What are the costs associated with the above?

Employee Title	Training Method, Duration	Costs
Employee Title	Orientation Method/ Materials	Costs