# Task Analysis Worksheet

**Analyst:** _____ **Date:** _____

**Subject Matter Expert:** _____

**Location:** _____

**Job or Course Title:** _____

**Task Description:** _____

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**Importance Statement [Ask your SME to suggest any negative consequences of failing to build the product correctly.]** _____

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**STEP 1. PREPARE**

- ☐ Identify the subject matter expert (SME). Make arrangements for observing the SME perform the task. Explain to the SME what you hope to accomplish and why.
- ☐ Ask the SME to try to explain as much as possible while demonstrating the procedure. Advise the SME that you will be watching, asking many questions, and recording the information on paper [or audio/video tape].
- ☐ Gather and read any relevant documentation / Compile questions
- ☐ Familiarize yourself with the relevant equipment / Compile questions

**STEP 2. CONDUCT RESEARCH: Conduct observation/interview.**

- ☐ Meet with the expert performer and explain again what you hope to accomplish and why
- ☐ Ask the SME to perform the task, explaining each step as it is performed**.**
- ☐ Record steps on paper [or audio/video tape].
- ☐ Be alert to hidden knowledge / Ask questions to bring to the light!

**STEP 3. ANALYZE THE INFORMATION: After the observation/interview, review your notes or videotape. What did you learn about the following areas that could impact the task-detailing of this procedure?**

1. Prerequisites: [Are there any tasks that one would have to be able to do before one could do this task? Were any mentioned or do any come to mind, now that I think about it?] _____

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2. Tools and Materials: [List all tools and materials shown or suggested. Note items that may require follow-up clarification.]

3. Hazards and Safety: [Consider safe practices shown or apparently violated. Note items that may require follow-up verification.]

4. Hidden Knowledge: [What steps were physically or mentally invisible to me? Of these, what steps were clarified by my questions at the time, and what steps will require further clarification, now that I think about it?]_____

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5. Critical Steps and Concepts: [Have I included all steps, however "insignificant," so that I can be sure that the task will not be performed wrongly? Are there any concepts that must be made clear so that the task will not be performed wrongly?] _____

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6. Other Related Procedures: [Are there other tasks that one would have to do, associated with this part of the machine, that were not listed in the job analysis process? Were any mentioned or do any come to mind, now that I think about it?]

**STEP 4. ORGANIZE YOUR RESEARCH. Draft the task detailing.**

☐ If necessary, revise your "notes." It is possible that you made revisions as you went along, being careful to re-sequence steps as the procedure was demonstrated.
- Unscramble your notes and put into accurate sequence. This DOES NOT mean that you have to rewrite the whole procedure. Editing notes and arrows are OK.
- Your draft needs to be clear to you the author
- It will be the basis for designing and creating an effective job aid (performance aid)

**STEP 5. VERIFY THE TASK DETAILING.:**

☐ Do one or more of the following:
- Perform the task yourself using the draft
- Ask the SME to perform the task using the draft
- Ask a person unfamiliar with the procedure to perform the task using the draft

☐ Revise the draft accordingly