



Disclaimer: This is document should not be considered a tool for financial or operational advice. This excel document should be used a template only, any calculations should be audited by an external source. You should seek appropriate counsel for your own situations.

	Task Description	Importance	Complexity of Person	Training inside company	Professional Skill	Hours per month	Appropriate Role to Handle Task	Appropriate Kind of Person to Handle Task
<b>Importance of the task to the organization's purpose, mission, and functionality:</b>								
5 = Crucial, vital, cannot be messed up								
4 = Core								
3 = Necessary for functioning								
2 = Should be done, when time allows								
1 = Would be nice								
<b>Complexity of Person:</b>								
5 = Is <i>the driver</i> , the go-to person for moving through complex challenges								
4 = Can create new ways of doing things without guidance - knows where to look and what to look for								
3 = Generally capable, and when they're in over their head, they know it and happily seeks the support needed								
2 = Can function easily on all regular tasks and handle the occasional odd situation								
1 = Manages all regular tasks without guidance, pushes off abnormal situations to supervisor								
<b>Amount of Training within organization/business - about the internal systems, the programs, the people and relationships:</b>								
5 = One-on-one training on a regular basis								
4 = Significant, but occasional, one-on-one training								
3 = One-Time training in person, otherwise pretty self-explanatory								
2 = A written description will suffice								
1 = A person could just do the task without knowing anything specific or unique								
<b>Professional Skill of the person - what do they bring with them as far as their skills and capacities?:</b>								
5 = Requires PhD level of awareness or skill								
4 = Requires graduate study or significant immersion								
3 = Requires college degree or that level of capacity								
2 = Requires specialized training or certificate kind of knowledge								
1 = Requires general working individual abilities								