

BSJ Needs Assessment Report

Business:

Date:

Time in/out:

Business Personnel Present:

Location/Site:

Technical Advisor (s) (TA):

Client's Goal(s):

Client's Motivation:

Summary of Assessment (to include a statement on the actual need identified and any major risks and limitations that might affect accomplishing the desired outcomes).

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Details of Assessment

Section 1 – 6 provides guidance regarding the areas for which information is to be collated to determine the needs as applicable

Section 1 Business Basics

- 1.1 Chief Personnel
- 1.2 Responsible Officer (CSP)
- 1.3 Contact information
 - Address of Business (head office and site of activity, if different)
 - Telephone, email, fax
 - Email
- 1.4 Subsidiaries/ branches (local or international)
- 1.5 Product and Services
- 1.6 Brand
- 1.7 Markets (local, export, online)
- 1.8 Years in operation (start date)

Section 2 Organisational Structure

- 2.1 Organizational Structure
- 2.2 Board of Directors
- 2.3 Management Team
- 2.4 Number of Employees

Section 3 Strategic Direction

- 3.1 Vision Statement
- 3.2 Mission Statement
- 3.3 Business Goals
- 3.4 Business values
- 3.5 Policies
- 3.6 Third Party Certification

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Section 4 Regulatory Compliance

- 4.1 Licences
- 4.2 Permits
- 4.3 Certificates of Registration
- 4.4 Certificates of Incorporation
- 4.5 Tax Compliance
- 4.6 Other

Section 5 Business Process (Product / Service Actualization)

- 5.1 Process Flow
- 5.2 Process Control
- 5.3 Quality Control
- 5.4 Quality Assurance
- 5.5 Formulations, Schedule Processes
- 5.6 Specifications
- 5.7 Business Plan
- 5.8 Marketing Plan
- 5.9 Sales Strategy

Section 6 Business Resources

6.1 Physical Resources

- Premises (internal/ External)
- Building/ Infrastructure/Layout
- Employee Facilities
- Equipment
- Vehicle/transportation
- Distribution
- Energy and Utility
- Technology

6.2 Intellectual

- Trademark
- Patent
- Copyright
- Partnerships
- Propriety knowledge
- Customer data
- Customer loyalty/ base

6.3 Financial

- Listed company (local and international)
- Audited financial statements
- Documented accounting system
- Diversified product/ service portfolio
- Cash flow/ liquidity
- Gross Income (range)
- Support needs
- Insurance
- Bankruptcy
- Other

6.4 Human Resources

- Structured HR system
- Staff compliment (adequacy for purpose)
- Education/knowledge
- Competence
- Training Programs
- Emotional support systems
- OSH systems

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Section 7 Documentation and Record Keeping

- 7.1 Manuals
- 7.2 Procedures
- 7.3 Work Instructions
- 7.4 Records
- 7.5 Meeting minutes

Section 8 Management System

- 8.1 A gap audit should be conducted for businesses desirous of implementing management systems / standards. In this instance, the standard should be used as the audit criteria.

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Technical Advisor

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Date