

# DACUM Research Chart for Small Business Manager

Produced for



## DACUM Panel

Victoria Cielo, President & Owner  
King Tiger Martial Arts Chesapeake  
Chesapeake, VA

Anthony Claud, President & CEO  
Claud's Lawn Care  
Portsmouth, VA

Richard Good, CEO (Retired)  
Solar Services Incorporated  
Virginia Beach, VA

Suzanne Luna, President  
Law Offices of Suzanne E. Luna, PC  
Virginia Beach, VA

Denise Shreckhise, Former Owner &  
Operator  
Shreck's Ornamental Nursery, Inc.  
Port Republic, VA

Andrew Silverstone, DVM, Medical Director  
Veterinary Hospital of Virginia Beach  
Virginia Beach, VA

Christopher J. Wilson, Managing Funeral  
Service Provider  
Hale Funeral Home  
Norfolk, VA

## DACUM Facilitators

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# DACUM Research Chart for Small Business Manager

## DUTIES

## TASKS

<b>A. Maintain Customer Satisfaction</b>	A.1 Assess client service or product needs	A.2 Present service or product options to meet client needs	A.3 Negotiate client service or product commitment	A.4 Monitor service or product delivery for quality
<b>B. Manage Small Business Products and Services</b>	B.1 Perform market analysis	B.2 Identify small business clients	B.3 Develop small business branding materials (e.g., logo, website, t-shirts)	B.4 Determine small business market strategy
	B.10 Update small business marketing strategies	B.11 Participate in community outreach events		
<b>C. Manage Small Business Employees</b>	C.1 Develop small business job descriptions	C.2 Advertise open positions	C.3 Review resumes and applications	C.4 Select candidates for interviews
	C.10 Evaluate employee performance	C.11 Provide resource referrals (e.g., coaching, mentoring, support)	C.12 Provide employee PD opportunities	C.13 Manage employee work relationships
<b>D. Manage Small Business Administrative Functions</b>	D.1 Establish small business work plans	D.2 Schedule small business employee work flow	D.3 Supervise small business employees	D.4 Select small business vendors
	D.10 Maintain small business safety standards (e.g., ice, water)	D.11 Maintain small business security standards (e.g., keys, lights, alarm)		
<b>E. Manage Small Business Finances</b>	E.1 Develop small business budget	E.2 Price small business products or services	E.3 Close small business sales opportunities	E.4 Create small business customer invoices
	E.10 Manage small business taxes (employee, property, sales and use)	E.11 Reconcile small business bank accounts	E.12 Review internal small business expense reports	E.13 Create small business financial reports (e.g., monthly, quarterly, annually)

A.5 Assess client satisfaction	A.6 Maintain client relationships			
B.5 Develop small business digital advertising	B.6 Develop small business print advertising	B.7 Develop small business media advertising	B.8 Monitor small business competitors' marketing products and/or services	B.9 Determine small business market return on investment
C.5 Interview selected candidates	C.6 Negotiate small business employee compensation and benefits	C.7 Hire selected candidates	C.8 Provide new hire orientation	C.9 Provide new hire training
C.14 Terminate small business employees				
D.5 Maintain small business client records	D.6 Conduct small business meetings (e.g., vendor, staff)	D.7 Manage small business office communications (e.g., phone calls, emails)	D.8 Establish small business policies and procedures	D.9 Develop small business employee handbook
E.5 Monitor small business cash flow	E.6 Manage small business accounts receivable	E.7 Manage small business employee work hours	E.8 Manage small business employee payroll and benefits	E.9 Manage small business accounts payable (e.g., vendors, suppliers)
E.14 Analyze small business finances with financial advisor (e.g., insurance, CPA, attorney)				

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## DUTIES

## TASKS

<b>F. Manage Small Business Permanent Assets and Inventory</b>	F.1 Research small business permanent assets and inventory needs	F.2 Negotiate small business vendor agreements	F.3 Create small business purchase orders for inventory	F.4 Purchase small business permanent assets/ inventory (e.g., facility, equipment)
	F.10 Sell small business inventory	F. 11 Create small business inventory reports	F. 12 Re-stock small business inventory	F. 13 Process small business inventory warranties and
<b>G. Comply with Business Government Regulations</b>	G.1 Determine business structure (e.g., LLC, corporation)	G.2 Research small business occupation and license requirements	G.3 Obtain small business licenses and certifications	G.4 Review government ordinances
<b>H. Participate in Professional Development</b>	H.1 Participate in continuing education	H.2 Participate in professional organizations	H.3 Participate in professional networking events	H.4 Participate in community organizations
	H.10 Sponsor events for experts in the field	H.11 Participate in media interviews	H.12 Provide service on local board(s) of directors	
<b>I. Forecast Small Business Growth</b>	I.1 Develop new small business services and products	I.2 Analyze small business future purchase needs	I.3 Establish small business lines of credit	I.4 Develop strategies for expansion of facilities and
	I.10 Identify companies for acquisition or merger	I.11 Develop small business exit or sale strategies		

F.5 Insure small business assets	F.6 Maintain schedule of permanent small business assets	F.7 Maintain small business facilities and assets	F.8 Update small business IT software	F.9 Track small business inventory
F. 14 Liquidate small business permanent assets	F. 15 Depreciate small business permanent assets			
G.5 Obtain code compliant permits (e.g., fire, building, electrical)	G.6 Create government compliant policies and procedures (HIPPA, OSHA, Patriot Act)	G.7 File government reports (e.g., tax, corporate, dissolution of business)	G.8 Research government law updates	G.9 File intellectual property applications (e.g., patent, trademark, copyright)
H.5 Participate in professional conferences	H.6 Conduct workshops and conference sessions	H.7 Publish professional literature	H.8 Teach academic courses	H.9 Mentor professional aspirants (e.g., students, interns, peers)
I.5 Identify least profitable products or services	I.6 Identify most profitable products or services	I.7 Assess unmet client, product or service needs	I.8 Evaluate vendor agreements	I.9 Promote small business legislation

## General Knowledge and Skills

### Knowledge

Social media  
Business  
Accounting  
Legal  
Computer  
Human resources  
Marketing

### Skills

Customer/client relationship  
Negotiation  
Communication  
Interpersonal  
Networking  
Coaching/mentoring  
Motivational  
Decision-making  
Time management  
Multi-tasking  
Delegation  
Leadership  
Research  
Computer

## Behaviors

Honest  
Dependable  
Patient  
Flexible  
Empathetic  
Trustworthy  
Organized  
Resilient  
Punctual  
Innovative  
Efficient  
Tenacious  
Polite  
Decisive  
Compassionate  
Strategic  
Appreciative  
Integrous  
Professional  
Generous  
Common sense  
Risk tolerant

## Acronyms

LLC Limited Liability Company  
IT Information Technology  
SB Small Business  
CPA Certified Public Accountant  
PD Professional Development  
HIPPA Health Insurance Portability and Accountability Act

## **Tools, Equipment, Supplies and Materials**

- Computer
- Fax/scanner
- Internet
- Car/transportation
- Phone
- General office supplies
- Business specific tools
- Reference materials
- Credit cards/checks/petty cash
- First aid kit
- Company website
- Coffee maker

## **Future Trends and Concerns**

- Complexity of taxes and government regulations
- Social media as a marketing tool
- Impact of climate change
- Fuel price fluctuations
- Internet misinformation
- Online or low cost sales competition
- Market instability/business obsolescence and innovation
- Government impact on business and economy (shutdowns, funding cuts)