



# MEETING FOUR: CREATE A STRUCTURE

## TASK LIST: MANAGEMENT AND LEADERSHIP

THE FOLLOWING TASKS WILL NEED TO BE COMPLETED BY YOUR TEAM IN ORDER COMPLETE THE **BUSINESS SNAPSHOT** AND LAUNCH YOUR BUSINESS.

### Tasks

1. Select a leader for your Business Team.
2. Decide on a leadership style.
3. Lead a Company vote on leadership style.
4. Decide who is in charge of leading Company meetings, updating the **Business Snapshot**, and any other related tasks.
5. Decide how to assign tasks.
6. Name the Company.
7. Determine the Company's Guiding Principles.
8. Lead the Company's capitalization planning and efforts.
9. Determine how to motivate Company staff.
10. Track information for the Annual Report.
11. Prepare for JA Competition(s), if applicable.
12. Create a mission statement.
13. Optional: Guide liquidation and separation from JA.

### Instructions

1. Information from the tasks highlighted in blue should be included and updated on the Company's **Business Snapshot**.
2. Download and use separate documents and workbooks as noted in individual tasks.
3. As necessary, add Topics in the blank tables at the end of the chart.

WHAT TO RECORD IN EACH COLUMN OF A TOPIC TABLE:

TASK	LEADER	DEADLINE	RESULTS	STATUS
<i>Actions related to the topic</i>	<i>Who is primarily in charge</i>	<i>Date for completion</i>	<i>Was a decision made? Next steps? Other results?</i>	<i>Complete? Pending? Research? Other?</i>

### Topics



### LEADERSHIP TEAM LEADER

TASK	LEADER	DEADLINE	RESULTS	STATUS
Decide who will be the primary leader of your Business Team. This person will be in charge of organizing and leading sub-meetings for this Business Team, keeping track of progress on all assigned tasks for this portion of the Business Snapshot, and keeping the Business Snapshot up-to-date for the whole Company to review.				

### DECIDE COMPANY LEADERSHIP STRUCTURE

TASK	LEADER	DEADLINE	RESULTS	STATUS
Read the following article from Forbes.com <a href="#">4 Ways For Leaders to Make a Decision</a>				



## DECIDE COMPANY LEADERSHIP STRUCTURE

TASK	LEADER	DEADLINE	RESULTS	STATUS
<p>Decide on which of the four styles of leadership the Company would adopt, and prepare a brief presentation that includes a summary of the four and your team's recommendation.</p> <ol style="list-style-type: none"> <li>How will leadership be determined?</li> <li>How will major decisions be made?</li> <li>What if multiple people want to do the same job or have the same leadership position?</li> <li>What if there are jobs that need to be done but no one wants to do them?</li> <li>Based on what Company members have learned about themselves and each other in Meeting One, identify the members who are best suited for each of the tasks needed in each of the five Business Snapshot teams.</li> </ol> <p><b>DUE: Before Meeting Five begins.</b></p>				
<p>During the next whole Company meeting, present the summaries and recommendations and lead the whole Company in a discussion and vote for a style of decision-making.</p> <p>Members may decide on a formal structure with elected officers; for more information about this option, visit the Topic: Leadership module found after Meeting Thirteen.</p>				



## DECIDE COMPANY LEADERSHIP STRUCTURE

TASK	LEADER	DEADLINE	RESULTS	STATUS
<p>Decide who is in charge of leading the Company meetings (along with the JA Volunteer).</p> <p><b>DUE: Before Meeting Five begins.</b></p>				
<p>Decide who is responsible for keeping the <b>Business Snapshot</b> updated for the whole Company and following up on tasks that are incomplete.</p> <p><b>DUE: Before Meeting Five begins.</b></p>				
<p>Decide on the additional tasks that are needed to organize the Company leadership, i.e., elections, ballots, how to communicate rules and decisions, and so on. Add tasks to this portion of the Business Snapshot to accomplish your leadership plan. Some further questions to consider:</p> <p>Specifically, describe how tasks will be assigned once the Business Snapshot is complete after the next meeting. For example:</p> <ol style="list-style-type: none"> <li>1. Elect a president and that person decides.</li> <li>2. Elect a leader for each of the five major sections of the Business Snapshot and have them choose who they want to work with.</li> <li>3. Let everyone sign up for his or her preferred area of interest and then manage changes if some areas are understaffed.</li> </ol>				



## NAMES

WHAT IS THE NAME OF THE COMPANY AND NAME OF THE PRODUCT OR SERVICE?

NAMES SHOULD BE CATCHY, DESCRIPTIVE IF POSSIBLE, AND APPEALING TO YOUR TARGET AUDIENCE.

TASK	LEADER	DEADLINE	RESULTS	STATUS
Meet with the Marketing team to consider names. <b>Team Crossover: Marketing</b> (The name(s) may overlap with the marketing plan, so work closely with that team.)				
Brainstorm names.				
Test name(s) with likely customers. <b>Team Crossover: Marketing</b>				
Other naming tasks?				

## LEGAL

ARE THERE ANY LEGAL CONSIDERATIONS TO REVIEW, SUCH AS THOSE FROM THE MEETING THREE VETTING PROCESS?

TASK	LEADER	DEADLINE	RESULTS	STATUS
Review Meeting Three findings.				
Remember to check for patent and trademark issues:  <a href="http://www.uspto.gov/patents/process/search/">www.uspto.gov/patents/process/search/</a>  <a href="http://www.uspto.gov/trademarks/index.jsp">www.uspto.gov/trademarks/index.jsp</a>  <b>Team Crossover: Marketing</b>				
Research with any local, state, or national agencies that govern your chosen industry.				



## LEGAL

ARE THERE ANY LEGAL CONSIDERATIONS TO REVIEW, SUCH AS THOSE FROM THE MEETING THREE VETTING PROCESS?

TASK	LEADER	DEADLINE	RESULTS	STATUS
List any additional recommendations or considerations to ensure your product is safe, legal, and appropriate for your customers and the community.				
Other legal-related tasks? Add additional tasks as necessary. (Instructions? Packaging? Etc.)				

## COMPANY GUIDING PRINCIPLES

TASK	LEADER	DEADLINE	RESULTS	STATUS
Decide what rules or principles the Company members should agree to, up front, in order to avoid conflict later. To view some examples of the possible rules to include, view the document titled <b>Guiding Principles</b> .				
Review and complete the Guiding Principles document for JA Company and have each member sign a copy agreeing to abide by the list. It is strongly suggested that the whole Company gives input, especially the JA Volunteer, before finalizing the list.				



## COMPANY CAPITALIZATION

TASKS	LEADER	DEADLINE	RESULTS	STATUS
<p>Once the method of capitalizing the Company is determined (research by the Finance team and agreed to by the whole Company), it becomes the Leadership's task to lead the actual capitalizing of the Company.</p> <p>To access the shares that you will issue to your investors, view the document titled <b>JA Company Program Shares</b>. Update the share value if needed and print enough to ensure you reach your capitalization goal. Shares will be used to track investor information for both parties. <b>Team Crossover: Finance</b></p>				
<p>Track progress toward meeting the capitalization goal set by the Finance team. <b>Team Crossover: Finance</b></p>				

## MOTIVATION

TASK	LEADER	DEADLINE	RESULTS	STATUS
Motivate Company staff to meet its portion of the capitalization goal—if it is divided among the whole Company.				
Motivate Company staff to meet its sales goal—if it is divided among the whole Company.				
Motivate staff who have not completed the assigned tasks in its Business Teams.				



## MOTIVATION

TASK	LEADER	DEADLINE	RESULTS	STATUS
Are there any incentives or other morale builders to keep members passionate about the business venture and their individual tasks?				
One tremendous source of information about all five specialty teams is <a href="http://www.sba.gov/">www.sba.gov/</a> , the Small Business Administration. Refer the Company members there for information as needed.				

## ANNUAL REPORT

TASK	LEADER	DEADLINE	RESULTS	STATUS
Each Business Team is supposed to keep track of information needed for the final Annual report. At the end of the program, the Leadership team will compile all the data into an annual report for presentation. Monitor and follow-up to be sure that all teams are keeping track of their information in the <b>Business Snapshot</b> . <b>Team Crossover:</b> <b>All 5 Business Teams</b>				





### JA COMPETITION (OPTIONAL)

TASK	LEADER	DEADLINE	RESULTS	STATUS
<p>If your Company is participating in a JA competition event, it is for the Leadership team to know the rules and requirements and lead the team in being prepared for the competition.</p> <p><b>Team Crossover:</b> <b>All 5 Business Teams</b></p>				

### COMPANY MISSION STATEMENT (OPTIONAL)

TASK	LEADER	DEADLINE	RESULTS	STATUS
<p>Once the Business Snapshot is complete in Meeting Five, decide if your Company will have one focused mission statement. This can also be done at the beginning of Meeting Five to guide the Business Snapshot decisions if the Company members have a unified mission.</p> <p>For more information about this option, visit the Meeting Five: Deeper Dive.</p>				



## SEPARATION FROM JUNIOR ACHIEVEMENT AND LIQUIDATION

TASK	LEADER	DEADLINE	RESULTS	STATUS
<p>Following Meeting Twelve, the Company will be separated from Junior Achievement.</p> <p>It may be liquidated, with the funds being used to pay bills or the charitable donation and proceeds divided as outlined in the Guiding Principles, or some or all of the Company members can continue as their own business venture, assuming all responsibilities.</p> <p>The Leadership team should lead these discussions and carry out any final tasks needed prior to the final Meeting, including an acknowledgement letter to the volunteer.</p>				

### TOPIC

TASKS	LEADER	DEADLINE	RESULTS	STATUS

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