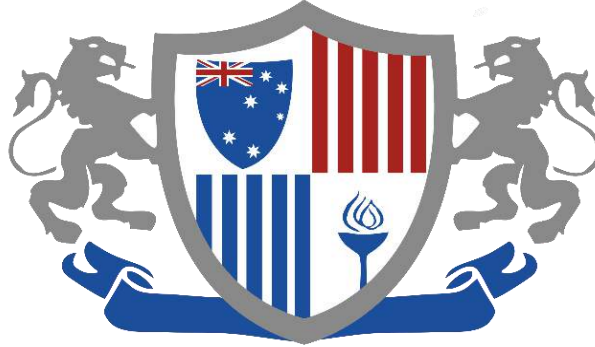


Australis



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Learner Assessment Pack

BSBOPS601

Develop and implement business plans



Australis Institute of Technology and Education

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BSBOPS601 - Develop and implement business plans (Release 1)



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from this material. Information in this course material is current at the time of publication.





Version Control & Document History

Date	Summary of modifications	Version
29 December 2020	Version 1 final produced following assessment validation.	1.0





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Learner Assessment Pack

Assessment Delivery



Learner Information

This **Learner Assessment Pack** is designed for you to complete the assessment for **BSBOPS601 - Develop and implement business plans (Release 1)**. It may refer to your own workplace/organisation, or to a simulated business provided by your assessor.

The assessment tasks include **Short Answer Questions** where you need to demonstrate your knowledge and understanding of the unit, and the **Practical Assessment**, where you need to demonstrate your skills required in the unit. It is recommended that you complete the Practical Assessments in your own workplace/organisation. If you don't have access to a real workplace, you can complete the assessment in a simulated environment where resources and conditions similar to a workplace must be accessed. Ensure to discuss this with your assessor prior to commencing with the assessment.

Each Learner Assessment Pack is made up of four parts:

Assessment Delivery

- Learner Information
- Steps for Learner
- Assessment Agreement

Assessment Tasks

Assessment Tasks, including:

- Short Answer Questions
- Practical Assessment

Assessment Workbook Checklist

- Assessment Workbook Checklist

Recording

- Record of Assessment



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Before you commence your assessment, ensure that you have a good knowledge of the subject, have thoroughly read your Learner Resource, and clearly understand the assessment requirements and the expectations of the industry to which the assessment is related.

Assessments are designed to be completed using your industry/organisation, but your Registered Training Organisation (RTO) may assist you by contextualising the unit to be completed in a simulated workplace environment.

You will be required to demonstrate knowledge and skills which must be observed directly by your assessor. Where the observation task may be difficult for the assessor to directly observed, a video recording of the practical observation task must be submitted as supplementary evidence. Verification from at least one third-party signatory, and preferably two or more witnesses is required to confirm your demonstration of these practical knowledge and skills. These witnesses would usually be your current or recent supervisors, or your assessor.

The practical assessment tasks may be completed using your own workplace, a simulated environment, or a mix of both, as instructed by your assessor. To contextualise this assessment to your industry/organisation, you may be asked by your assessor to provide additional information based on your industry/organisation.

Instructions are given for each task. If you have questions, or unclear how to proceed, consult with your assessor.

Records of all aspects of the assessment must be kept in your Learner Assessment Pack

The record of assessment is a **legal document** and must be signed, dated, and a copy stored as required by your Registered Training Organisation (RTO).

Steps for Learners

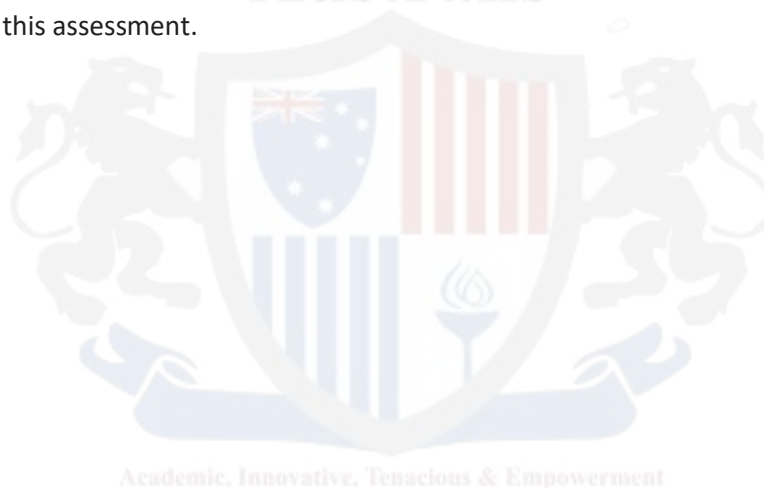
Your Learner Assessment Pack:

1. Upon receiving your Learner Assessment Pack, discuss with your assessor the expectations and requirements of this assessment. You may also need to supply contact details of one or two work referees who can confirm your skills in the industry.

Discuss with your assessor if you intend to undertake the practical assessment tasks based on your employing organisation, in a simulated business, or in a mix of both.

2. Your Learner Assessment Pack is where you will get the task information. Complete each task as instructed using either your own workplace, or using a simulated business, as discussed with your assessor.
3. After you complete your assessment, gather and submit your evidence documents as detailed in the task(s) in the timeframe agreed with your assessor.

Your assessor will advise you if there are any further steps for you to take to satisfactorily complete this assessment.



Reasonable Adjustment

Adapted Reasonable Adjustment in teaching, learning and assessment for learners with a disability - November 2010 - Prepared by - Queensland VET Development Centre

Reasonable adjustment in VET is the term applied to modifying the learning environment or making changes to the training delivered to assist a learner with a disability. A reasonable adjustment can be as simple as changing classrooms to be closer to amenities or installing a particular type of software on a computer for a person with vision impairment.

Why make a reasonable adjustment?

We make reasonable adjustments in VET to make sure that learners with a disability have:

- The same learning opportunities as learners without a disability, and
- The same opportunity to perform and complete assessments as those without a disability.

Reasonable adjustment applied to participation in teaching, learning and assessment activities can include:

- Customising resources and assessment activities within the training package or accredited course
- Modifying the presentation medium
- Learner support
- Use of assistive/adaptive technologies
- Making information accessible both before enrolment and during the course
- Monitoring the adjustments to ensure learners needs continue to be met

Assistive/Adaptive Technologies

Assistive/Adaptive technology means 'software or hardware that has been specifically designed to assist people with disabilities in carrying out daily activities' (World Wide Web Consortium - W3C). It includes screen readers, magnifiers, voice recognition software, alternative keyboards, devices for grasping, visual alert systems, digital note-takers.

IMPORTANT:

Reasonable adjustment made for collecting learner assessment evidence must not impact on the standard expected by the workplace, as expressed by the relevant unit(s) of competency. For example, if the assessment were gathering evidence of the learner's competency in writing, allowing the learner to complete the assessment verbally would not be a valid assessment method. The method of assessment used by any reasonable adjustment must still meet the competency requirements.

Resources Required for Assessment

To complete the Practical Assessment tasks, you will require access to:

- Computer with internet and email access and a working web browser
- Installed software: Word, Adobe Acrobat Reader, Excel, PowerPoint
- A workplace, or a simulated workplace environment that will allow you access to:
 - Relevant information
 - Printed or online sources for research on market requirements and competition
 - Workplace documentation, including:
 - Organisational documents including:
 - Organisational documents from where mission, vision, business objectives, goals, business values, and pre-existing strategic, business and operational plans can be accessed
 - Financial statements to support the financial indicators in the business plan such as historical financial statements for previous year, budgeting information for current year and prospective financial statements for next year. Financial statements must include profit & loss statement, balance sheet statements and cash flow statements
 - Organisational and workplace policies and procedures such as:
 - Business plan implementation and monitoring
 - Performance measurement
 - Business Assessment Report template, or similar from the learner's workplace/organisation
 - Meeting Minutes template, or similar from the learner's workplace/organisation
 - Business plan template, or similar from the learner's workplace/organisation
 - Implementation and Monitoring Report template, or similar from the learner's workplace/organisation
 - Business Review Report template, or similar from the learner's workplace/organisation

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- People, including:
 - At least two relevant stakeholders
 - whom the learner will consult to develop performance objectives and measures, and identify resource requirements for the business plan
 - with whom the learner can communicate the business plan, and confirm availability of human resource requirements for implementation of the business plan

Relevant stakeholders consulted for Workplace Project Task 2 and Workplace Project Task 4 can be the same stakeholders so long as they can assist with the information required by the learner for each of the above outlined tasks.
 - At least one supervisor/manager, preferably part of the senior management, who will be involved in the following:
 - to sign-off on the Implementation and Monitoring Report to confirm that the business plan was implemented by you
 - to whom the learner can communicate the Implementation and Monitoring Report
 - to whom the learner can communicate the Business Review Report
 - At least two underperforming staff for whom the learner can conduct a group coaching session

They will be identified after the implementation of the business plan.
- Opportunity to:
 - Consult and communicate with at least two relevant stakeholders to:
 - develop and finalise performance objectives and measures for the business plan
 - identify resource requirements for the business plan
 - confirm availability of human resource requirements for implementation of the business plan
 - Conduct a group coaching session on business performance with at least two underperforming staff



Accessing Intranet Pages and External Links

Throughout this workbook, you will be asked to access specific pages from the simulated business, Bounce Fitness. Links to these pages are formatted in [Blue Text](#).

To access these, hold the **Ctrl key for Windows users** while clicking on these links. **For Mac users**, directly click the link.

The simulated business, Bounce Fitness, can be accessed by going to <http://bouncefitness.precisiongroup.com.au>.

Login to Bounce Fitness using the username and password provided by your Registered Training Organisation (RTO).





Assessment Agreement

Instructions:

Discuss and accomplish this section with your assessor before commencing then sign the confirmation at the end of this Agreement.

Please tick at least one of the following for each section:



Delivery Method

- Classroom
- Small Group
- One-on-One
- Online
- Other (please describe)

Assessment Pathway (for Practical Assessment)

- Learner's Organisation (Pre-assessment meeting conducted)
- Simulated Workplace Environment (Contextualised by RTO)

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Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry. This includes access to:

Business information and data relevant to performance evidence.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

To the assessor: Refer to the learner's name and signature on this page to authenticate each of the learner's submissions.

I confirm that the activities and assessment completed as part of this unit are my own work, and comply with all relevant copyright and plagiarism rules.

I understand that if there is any doubt of the authenticity of any piece of my assessment, I can be orally examined, and the signatory of evidence records may be contacted.

Learner's name

Learner's signature

Date

Assessor's name

Assessor's signature

Date

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End of Assessment Agreement

Learner Assessment Pack

Assessment Tasks





Tasks

Complete all tasks in this assessment as instructed. If you have questions, consult with your assessor.

Contextualisation of Assessments by RTOs

Contextualisation is the process of modifying assessment tools to make learning more meaningful for your learners and their employers.

Precision Group (Australia) recommends that your RTO contextualise the assessment tools to suit particular industry requirements and specific organisational requirements before using them. Contextualisation must retain the integrity of the assessment and the outcome of the unit of competency.





Short Answer Questions

Question 1

In the context of business plans:

- a. Outline the processes involved in developing business plans. Explain in your own words how each process is performed.
- b. Outline the processes involved in monitoring business plans. Explain in your own words how each process is performed.

a. Processes for developing business plans

Process	How the process is performed
i.	
ii.	
iii.	
iv.	
v.	
vi.	

b. Processes for monitoring business plans	
Process	How the process is performed
i.	
ii.	
iii.	
iv.	
v.	



Question 2

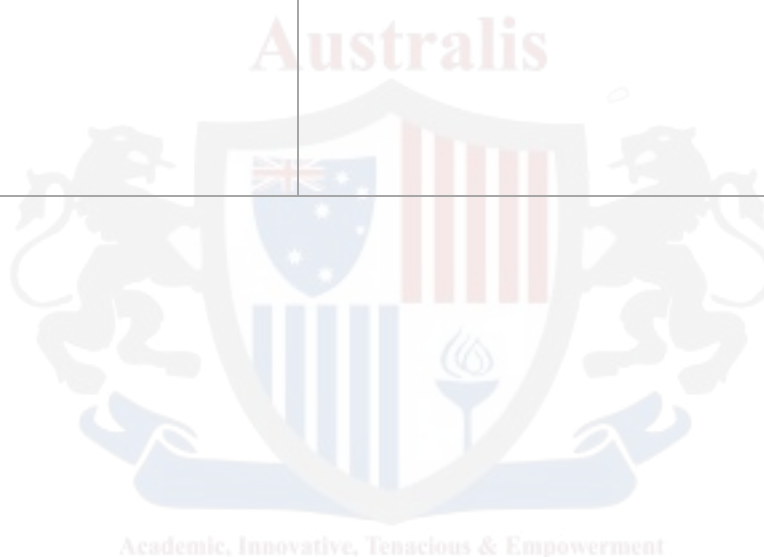
Briefly describe in your own words the following concepts relevant to developing business plans:

- a. Customer needs
- b. Budgeting information

For each of the following, outline at least two reasons why each of these are significant to developing a business plan.

a. Customer needs	
Brief description	Reasons why customer needs are significant to developing a business plan
	<p>i.</p>
	<p>ii.</p>

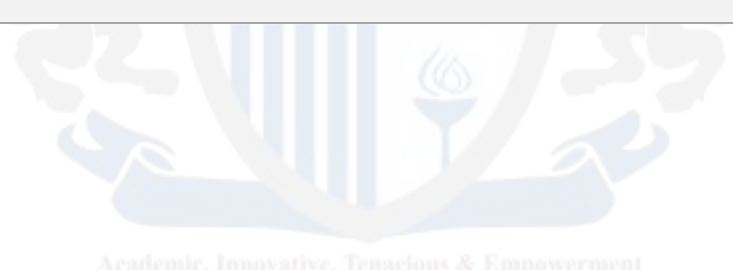
b. Budgeting information	
Brief description	Reason why budgeting information is significant to developing a business plan
	i.
	ii.



Question 3

List at least two relevant internal stakeholders and at least two relevant external stakeholders who should be consulted while developing a business plan.

Explain briefly how you can identify the stakeholders who should be involved in the development of business plans.

Internal Stakeholders	External Stakeholders
i.	i.
ii.	ii.
<p>How to identify relevant stakeholders who should be involved in the development of business plans</p>	
	

Practical Assessment

The **Practical Assessment** is a set of tasks that must be completed in a workplace, or in an environment with conditions similar to that of a real workplace.

To be assessed for this unit of competency, you must demonstrate your skills and knowledge to lead a business operation that covers the steps required to develop and implement business plans.

The Practical Assessments in this workbook include:

1. Workplace Project Assessment

A series of written practical tests assessing the learner's practical knowledge and skills underpinning of the unit of competency. This includes the learner completing workplace documents or similar as evidence of competent performance.

2. Workplace Practical Observation

A set of assessment tasks where the learner must demonstrate practical skills relevant to the unit of competency. These skills are to be demonstrated while being observed by the assessor.

IMPORTANT!

- All signatures/initials in your submissions, including yours, must be handwritten and dated. Submissions with signatures/initials must be scanned.
- The supervisor/observer who completes and signs your evidence submissions must provide their real name, contact number, and email address for your assessor's reference.
- Should you encounter issue or concerns regarding your assessment, contact your assessor.

Your State/Territory

Some tasks in this Practical Assessment require you to refer to relevant legislative and regulatory requirements applicable to the state/territory where the business plan you will develop and implement for this practical assessment is based or located in.

For your assessor's reference, indicate below which state/territory your workplace/organisation is based or located in by ticking the box that corresponds to your answer.

When completing these tasks, refer to the relevant legislative and regulatory requirements applicable to the state/territory you ticked below.

The state/territory where your workplace/organisation is based or located in.			
<input type="checkbox"/>	Australian Capital Territory	<input type="checkbox"/>	South Australia
<input type="checkbox"/>	New South Wales	<input type="checkbox"/>	Tasmania
<input type="checkbox"/>	Northern Territory	<input type="checkbox"/>	Victoria
<input type="checkbox"/>	Queensland	<input type="checkbox"/>	Western Australia

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Workplace Project Assessment

Project Overview

This workplace project assessment requires you to develop and implement at least one business plan.

This assessment is divided into seven tasks:

- Task 1: Prepare Business Assessment Report
- Task 2: Consult Stakeholders and Finalise Performance Objectives and Measures
- Task 3: Prepare Business Plan
- Task 4: Communicate Business Plan
- Task 5: Implement and Monitor Business Plan
- Task 6: Review Business Performance
- Task 7: Coach Underperforming Staff

This project requires you to complete the assessment tasks in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

Each task comes with a set of instructions. You are to follow and perform these instructions while being observed by the assessor and/or submit any required documentation.

Before starting this assessment, your assessor will discuss with you these tasks, including instructions and guidance for satisfactorily completing them.

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You are required to:

- Complete the tasks within the time allowed, as scheduled in-class roll.
- Develop a business plan according to the requirements of your organisation, in consultation with relevant stakeholders
- Communicate the business plan to relevant stakeholders, confirming availability of skilled resources to implement the business plan
- Implement and monitor the business plan prepared including testing the Performance Measurement System (PMS) defined in the business plan
- Review the business performance against planned objectives in the business plan, and analyse the strengths and weaknesses of the business plan
- Report to relevant stakeholders the review of the business plan
- Coach underperforming staff

Resources Required for Assessment

Resources you need to access to complete the project assessment are outlined in the [Resources Required for Assessment](#) section of this workbook, and in the corresponding *Assessor's Checklist and/or Observation Form* of each task.

Discuss each requirement with your assessor before commencing with each task. They will organise the resources required for this assessment.

IMPORTANT: Additional workplace resources may be required upon the contextualisation of this assessment.

Forms and Templates

Generic forms and templates are provided in the project tasks, unless otherwise specified. These can be accessed from the following link:

[BSBOPS601 Forms and Templates](#)

If you are currently in a workplace, use similar workplace templates and forms used by your organisation to complete each assessment task. Discuss with your supervisor and your assessor first to ensure that the forms/templates you will use from your organisation cover all criteria required by each assessment task.

Review these forms and templates with your assessor before starting the task.

Task 1: Business Assessment Report



ASSESSMENT INSTRUCTIONS

This task will require you to prepare a *Business Assessment Report* based on the organisation's existing information and data, and any further details from research. The *Business Assessment Report* will be used to prepare a *Business Plan* for your workplace or organisation in *Workplace Project Task 3*.

Use your workplace/organisation's template to complete this task, or use the **Generic Business Assessment Report** template provided at the Bounce Fitness site.

To complete this task, you must:

- Research the following information from your organisation's documents, and analyse how each are relevant to the business plan to be developed:
 - Vision statement
 - Mission statement
 - Goals
 - Business objectives
 - Business values
- Identify the pre-existing plans of the organisation and assess how each are relevant to the business plan to be developed, covering:
 - Strategic plan
 - At least one business plan
 - At least one operational plan
- Identify at least two legislations applicable to the organisation that are relevant to type of business activities, industry sector of the business and location of business operations (state/territory).
- Identify all permits and licenses that may be required for new activity and the specific location where each permit and licence is required.

Permits and licenses that you identify must be relevant to type of business activities, industry sector of the business and location of business operations (state/territory, city and specific area in the city)

Refer to the [Australian Business Licence and Information Service \(ABLIS\)](#) website for guidance.

- Review market requirements for the organisation's products and services relevant to the business plan to be developed

Review of market requirements refers to a review of the market conditions for the relevant products and services to understand customer needs, market size and target market.

- Research and analyse the marketing approaches of the organisation relevant to the business plan to be developed

Marketing approaches refer to the ways a business implements its marketing strategy. It typically includes marketing or distribution channels, and advertising and promotion methods used by the organisation.

- Research and analyse at least two competitors of your organisation, and compare them to your organisation.

- Research and analyse management arrangements required for the business plan you will develop.

Management arrangement refers to the arrangements made for the management of established contracts with external entities such as suppliers, distributors and contractors.

- Based on the above steps, identify and assess the business requirements for developing a business plan.

Business requirements refer to the reasons why a business plan is needed.

- Identify and assess at least two business plan objectives and at least two financial targets for the business plan to be developed

- *Business plan objectives are specific milestones to be achieved through implementation of the business plan, within specific timelines.*
- *Business plan objectives are typically related to growth, revenue, operational cost, productivity etc.*
- *Business plan objectives must meet the SMART criteria. (S = Specific, M = Measurable, A = Achievable, R = Relevant, T = Time-bound)*
- *At least two of the business plan objectives identified must have financial targets attached to them. Financial targets are financial performance goals that the business aims to achieve, such as revenue target or profit target or return on investment target etc.*

- Prepare a Business Assessment Report, incorporating all of the above requirements.

Review **Workplace Project Task 1 – Assessor’s Checklist** before starting this task. This form outlines the following:

- Resources you are required to access to complete the task.
- All criteria your submission must address to satisfactorily complete this task.

You assessor will discuss these resources with you, and the criteria outlined in this form prior to this assessment.

Review the template you will use to complete this task. If you are using a template from your workplace/organisation, discuss with your assessor to ensure that the template covers all requirements that apply to this task. Otherwise, use the **Generic Business Assessment Report** template provided at the Bounce Fitness site.

Submit the completed *Business Assessment Report* to your assessor. Include any supplementary documents/sources used to prepare the *Business Assessment Report*, such as:

- Organisational documents from where mission, vision, goals, business objectives, business values, pre-existing strategic plan, business plan and operational plan can be accessed
- Printed or online sources for research on market requirements and competition



Task 2: Develop Performance Objectives and Measures with Stakeholders



ASSESSMENT INSTRUCTIONS

Your assessor will observe you as you consult with at least two relevant stakeholders to identify resource requirements, and develop performance objectives and measures that will be used for preparing a Business Plan for your workplace or organisation in *Workplace Project Task 3*.

Use your workplace/organisation's template to submit evidence of completing this task, or use the **Generic Meeting Minutes** template provided at the Bounce Fitness site.

Identify at least two relevant stakeholders and fix a convenient time for meeting the stakeholders.

Relevant stakeholders for a business plan are any groups or individuals who are affected by the outcomes of the business plan and/or are able to influence the outcomes of the business plan positively or negatively. They can be internal or external to the organisation.

You will be assessed on your practical skills to:

- Meet with at least two relevant stakeholders. During the meeting, you must:
 - Present the Business Assessment Report you prepared in Workplace Project Task 1.
 - Identify each of the following for resource requirements for the business plan
 - At least two financial resources
 - At least two human resources
 - At least two physical resources
 - Reach an agreement on the following for the business plan to be developed:
 - At least two performance objectives
 - At least one performance measure for each performance objective
 - At least two Key Result Areas (KRAs)
 - At least two Key Results Indicators (KRIs) for each KRA

The performance measures, KRAs and KRIs developed in this task will constitute the Performance Measurement System (PMS) for the business plan to be prepared in *Workplace Project Task 3*.

- *Business plan objectives can be broken down into a set of performance objectives, which will help in achieving the business plan objectives.*
 - *Performance measures are a set of metrics that form part of the management's analysis to keep track of the current status of a project, a business plan or the overall organisation itself. Performance measures are also called KPIs.*
 - *Key Results Indicators (KRIs) are used to measure the outputs or outcomes in Key Result Areas (KRAs), that is, areas that are critical for the success of an organisation or business plan. KRIs are a subset of performance measures.*
- Use language and features appropriate to the relevant stakeholders to present information and seek guidance on the development of the business plan.
 - Use listening and questioning techniques to draw out the viewpoints of relevant stakeholders and to clarify or confirm understanding.
 - Work jointly with relevant stakeholders to realise shared results by enabling effective group interaction, influencing direction and taking a leadership role.

Review the following before starting this task:

- **Workplace Project Task 2 – Observation Form**

This form outlines all the practical skills you need to demonstrate to satisfactorily complete this task. Your assessor will also discuss with you the practical skills outlined in this form prior to the assessment.

- **Workplace Project Task 2 – Assessor's Checklist**

This form outlines the following:

- Resources you are required to access to submit evidence of completing this task. Your assessor will discuss these resources with you prior to this assessment.
- All criteria your submission must address to satisfactorily complete this task. Your assessor will also discuss with you the criteria outlined in this form, prior to the assessment.

Submit the Meeting Minutes From Consultation With Stakeholders to your assessor.

Task 3: Prepare Business Plan



ASSESSMENT INSTRUCTIONS

This task will require you to prepare a *Business Plan* based on information from *Workplace Project Task 1* and *Task 2*.

Use your workplace/organisation's template to complete this task, or use the **Generic Business Plan** template provided at the Bounce Fitness site.

To complete this task, you must:

- Prepare a business plan based on the *Business Assessment Report* prepared in *Workplace Project Task 1*, and *Meeting Minutes* from consultation with stakeholders prepared in *Workplace Project Task 2*. The following elements must be included in the business plan:
 - Brief description of the business
Brief description of the business includes business name, business structure, ABN, ACN (if applicable), date of establishment and business address.
 - Key people involved in the business plan
Key people involved in the business plan can be organisation's key shareholders or leadership team of the organisation or the leaders of the teams that will be involved in the business plan implementation.
This must include name and relationship with the organisation for at least two key people.
 - Products and services
This must be consistent with the review of market requirements section of the Business Assessment Report from Workplace Project Task 1.
 - Market review
This must be consistent with the review of market requirements section of the Business Assessment Report from Workplace Project Task 1.
 - Financial resource requirements
 - Human resource requirements
 - Physical resource requirements
Financial, human and physical resource requirements must be consistent with the Meeting Minutes From Consultation With Stakeholders from Workplace Project Task 2.

- Regulatory requirements

For a business plan, relevant regulatory requirements include any permits or licenses that may be required for new activity.

This must be aligned with the legislative framework section of the Business Assessment Report from Workplace Project Task 1.

- Marketing strategy

Marketing strategy refers to the blueprint for how an organisation plans to reach its target customers and sell its products or services to them. Marketing strategy in the business plan typically includes pricing structure, marketing or distribution channels and advertising and promotion methods.

This must be aligned with the marketing approaches and competition analysis sections of the Business Assessment Report from Workplace Project Task 1.

- Financial indicators

Financial indicators are statistics used to monitor the financial health and financial performance of the business plan, such as revenue, net profits and cash flow.

- Productivity and performance targets for key result areas

This should include the following information already developed in Workplace Project Task 2.

- *Key result areas (KRAs) for the business plan*
- *Performance measures and Key Results Indicators (KRIs) for the KRAs identified*
- *Targets for performance measures and KRIs*

These performance measures, KRAs and KRIs constitute the Performance Measurement System (PMS) that will be tested in Workplace Project Task 5.

Review **Workplace Project Task 3 – Assessor’s Checklist** before starting this task. This form outlines the following:

- Resources you are required to access to complete the task.
- All criteria your submission must address to satisfactorily complete this task.

You assessor will discuss these resources with you, and the criteria outlined in this form prior to this assessment.

Review the template you will use to complete this task. If you are using a template from your workplace/organisation, discuss with your assessor to ensure that the template covers all requirements that apply to this task. Otherwise, use the **Generic Business Plan** template provided at the Bounce Fitness site.

Submit the completed Business Plan to your assessor. Include any supplementary documents/sources used to create the Business Plan, such as:

- Organisational documents from where information needed for the brief description for the business such as business structure, ABN, ACN, date of establishment and business address
- Financial statements to support the financial indicators in the business plan such as historical financial statements for previous year, budgeting information for current year and prospective financial statements for next year.

Financial statements must include profit & loss statement, balance sheet statements and cash flow statements



Task 4: Communicate Business Plan



ASSESSMENT INSTRUCTIONS

This task will require you to communicate the Business Plan prepared in *Workplace Project Task 3* to relevant stakeholders and confirm the availability of human resource requirements to implement the business plan.

To complete this task, you must:

- Communicate the Business Plan prepared in *Workplace Project Task 3* to at least two relevant stakeholders of the organisation.

Relevant stakeholders are any groups or individuals who can confirm availability of human resource requirements to implement the business plan. Relevant stakeholders can be internal or external.

Relevant stakeholders can be the same as those who were consulted Workplace Project Task 2, if they can confirm availability of human resources for implementing the Business Plan prepared in Workplace Project Task 3.

- Confirm the availability of human resource requirements (including skilled labour) to implement the Business Plan prepared in *Workplace Project Task 3*, with the relevant stakeholders identified.

Human resource requirements (including skilled labour) must be consistent with the Business Plan prepared in Workplace Project Task 3.

- Submit evidence of the communication, and confirmation of the human resource requirements with relevant stakeholders.

Review **Workplace Project Task 4 – Assessor’s Checklist** before starting this task. This form outlines the following:

- Resources you are required to access to complete the task.
- All criteria your submission must address to satisfactorily complete this task.

You assessor will discuss these resources with you, and the criteria outlined in this form prior to this assessment.

Submit the completed evidence of communication with relevant stakeholders to your assessor. Evidence must be at least one of the following:

- Email correspondence
- Meeting minutes
- Video/Audio recording of the meeting

Task 5: Implement and Monitor Business Plan



ASSESSMENT INSTRUCTIONS

This task will require you to implement and monitor the business plan you prepared in *Workplace Project Task 3*, including testing the *Performance Measurement System (PMS)* defined in the *Business Plan*.

Use your workplace/organisation's template to complete this task, or use the **Generic Implementation and Monitoring Report** template provided at the Bounce Fitness site.

To complete this task, you must:

- Develop an implementation plan by filling in following information in the implementation plan section in the *Implementation and Monitoring Report*:
 - At least four activities required to implement the business plan, listed in sequence
 - Schedule of activities
 - Individual or team or department responsible for the activities
- Facilitate execution on the activities in the implementation plan, according to their schedule and describe the outcomes in the implementation plan section in the *Implementation and Monitoring Report*.

Facilitating execution of activities can include allocating the resources required to persons/teams responsible for the various activities, enabling decision-making, monitoring performance etc.

- Check whether the organisation has the permits or licenses that may be required for implementation of the business plan, as mentioned in the regulatory requirements section of the *Business Plan* prepared in *Workplace Project Task 3*.

If the organisation is not in compliance with any permit or license required for implementation of the business plan then identify the application kit for the permit or licence that needs to be obtained.

Application kits for permits and licenses can be accessed from the [Australian Business Licence and Information Service \(ABLIS\)](#) website.

- Test the *PMS* defined in the *Business Plan* prepared in *Workplace Project Task 3*, and refine where necessary.

This includes identifying a few performance measures for testing, comparing actual performance data from business plan implementation with the performance measure targets from the business plan and identifying areas of improvements.

- Report the following as they occur, by monitoring the *PMS*:
 - At least two system failures

This occurs when one of the internal systems of a business fails to meet the requirements expected during the business plan implementation (E.g. of internal systems: sales, purchasing, operations, finance etc.)
 - At least two product failures

This occurs when a product relevant to the business plan is unable to sustain its presence in the market or does not complete the lifecycle expected by the business or fails to realise profits.
 - At least two service failures

This occurs when the performance of a service relevant to the business plan fails to meet a customers' expectations.
 - At least four Variances

Variance is the difference between targets in the business plan and actual performance data when the business plan is implemented.

Reporting must include identification of the type of failure or variance, time when the failure or variance occurred, to whom the failure or variance was reported and time when the failure or variance was reported.

- Complete the Implementation and Monitoring Report, incorporating points from all of the above
- Receive sign-off on the report by your supervisor/manager to confirm your implementation of the Business Plan
- Communicate the Implementation and Monitoring Report to at least one person in senior management

Review **Workplace Project Task 5 – Assessor's Checklist** before starting this task. This form outlines the following:

- Resources you are required to access to complete the task.
- All criteria your submission must address to satisfactorily complete this task.

You assessor will discuss these resources with you, and the criteria outlined in this form prior to this assessment.

Review the template you will use to complete this task. If you are using a template from your workplace/organisation, discuss with your assessor to ensure that the template covers all requirements that apply to this task. Otherwise, use the **Generic Implementation and Monitoring Report** template provided at the Bounce Fitness site.

Submit the completed Implementation and Monitoring Report for this task to your assessor. Include any supplementary documents/sources used to implement and monitor the business plan prepared in *Workplace Project Task 3*, such as:

- Organisational and workplace policies and procedures related to business plan implementation and monitoring, performance measurement etc.
- Any other organisational and workplace policies and procedures relevant to the nature of the business plan being implemented. For example, if the business plan is for launch of a new product then organisational policies and procedures related to new product launch must be included.

You must also submit evidence of reporting to at least one person in senior management of the organisation.

Evidence must be at least one of the following:

- Email correspondence
- Meeting minutes
- Video/Audio recording of the meeting



Task 6: Review Business Performance



ASSESSMENT INSTRUCTIONS

This task will require you to review performance of business plan implemented in *Workplace Project Task 5*, by comparing actual performance data with targets in the business plan.

Use your workplace/organisation's template to complete this task, or use the **Generic Business Review Report** template provided at the Bounce Fitness site.

To complete this task, you must:

- Compare actual performance data in the *Implementation and Monitoring Report* from *Workplace Project Task 5* with performance measure targets in the *Business Plan* from *Workplace Project Task 3*.

Calculate variances between the performance measure targets and actual performance data.

Variance is the difference between performance measure targets in the business plan and actual performance data when the business plan is implemented.

- Identify root cause(s) for the variances.

Root cause is the main factor that drove the difference in actual performance from the target in the business plan.

- Assess the strengths and weaknesses of the business plan based on the *Implementation and Monitoring Report* from *Workplace Project Task 5* and variance analysis.
- Review performance measures and refine at least one performance measure.

Reviewing of performance measures includes identifying a few performance measures for reviewing, comparing actual performance data from business plan implementation with the performance measure targets from the business plan and then assessing the suitability for of the performance measures.

Suitability of the performance measures must be assessed on the following criteria: simple, relevant and actionable.

- Design and specify processes for ongoing review of business performance against business plan.
- Prepare a Business Review Report including all the above.
- Communicate the Business Review Report to at least one person in senior management.

The senior management to whom the Business Review Report is reported can be the same as the senior management from Workplace Project Task 5.

Review **Workplace Project Task 6 – Assessor’s Checklist** before starting this task. This form outlines the following:

- Resources you are required to access to complete the task.
- All criteria your submission must address to satisfactorily complete this task.

You assessor will discuss these resources with you, and the criteria outlined in this form prior to this assessment.

Review the template you will use to complete this task. If you are using a template from your workplace/organisation, discuss with your assessor to ensure that the template covers all requirements that apply to this task. Otherwise, use the **Generic Business Review Report** template provided.

Submit the completed Business Review Report for the review you conducted to your assessor. Include any supplementary documents/sources used to create the Business Review Report, such as:

- Organisational and workplace policies and procedures related to business plan implementation and monitoring, performance measurement etc.

You must also submit evidence of reporting to at least one person in senior management of the organisation.

Evidence must be at least one of the following:

- Email correspondence
- Meeting minutes
- Video/Audio recording of the meeting

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Task 7: Coach Underperforming Staff



ASSESSMENT INSTRUCTIONS

Your assessor will observe you as you coach underperforming staff, based on *Workplace Project Task 6*, to help them achieve better business performance for the organisation.

An underperforming staff member is one who fails to perform their role satisfactorily for the implementation of the business plan.

You will be assessed on your practical skills to:

- Identify at least two staff members responsible for unfavourable variances in the Business Review Report prepared in *Workplace Project Task 6*.

Unfavourable variance refers to when the actual performance data is worse than the target in the business plan.

- Conduct a group coaching session on business performance with the underperforming staff, so as to collaborate to achieve better business performance for the organisation.

Coaching can include informal on-the-job and off-the-job advice and training to an employee to help improve performance levels.

- Work jointly with staff to realise shared results by enabling effective group interaction, influencing direction and taking a leadership role.
- Offer support to staff in area of expertise, as required.

Review **Workplace Project Task 7 – Observation Form** before starting this task. This form outlines all the practical skills you need to demonstrate to satisfactorily complete this task. Your assessor will also discuss with you the practical skills outlined in this form prior to the assessment.

After completing this task, submit any written presentation materials that you used to conduct the group coaching session on business performance with underperforming staff. This can be any of the following:

- Powerpoint presentation
- Handouts

In addition, submit a list of underperforming staff you have coached along with details on their work roles.

Learner Assessment Pack

Assessment Workbook Checklist



Assessment Workbook Checklist

Instructions:

Your assessor will review your submissions against the checklist below. This section is to be completed by your assessor.

The learner has completed the Short Answer Questions in this workbook	✓
Short Answer Questions	<input type="checkbox"/>
The learner has completed the Practical Assessments in this workbook and has submitted all the required evidence:	✓
Workplace Project Assessment	
Task 1: Business Assessment Report	
Business Assessment Report	<input type="checkbox"/>
Task 2: Develop Performance Objectives and Measures with Stakeholders	
Meeting Minutes From Consultation With Stakeholders	<input type="checkbox"/>
Observation Form	<input type="checkbox"/>
Video recording of the meeting with stakeholders Only if direct observation is not possible.	<input type="checkbox"/>
Task 3: Prepare Business Plan	
Business Plan	<input type="checkbox"/>
Task 4: Communicate Business Plan	
Evidence of communication with stakeholders	<input type="checkbox"/>

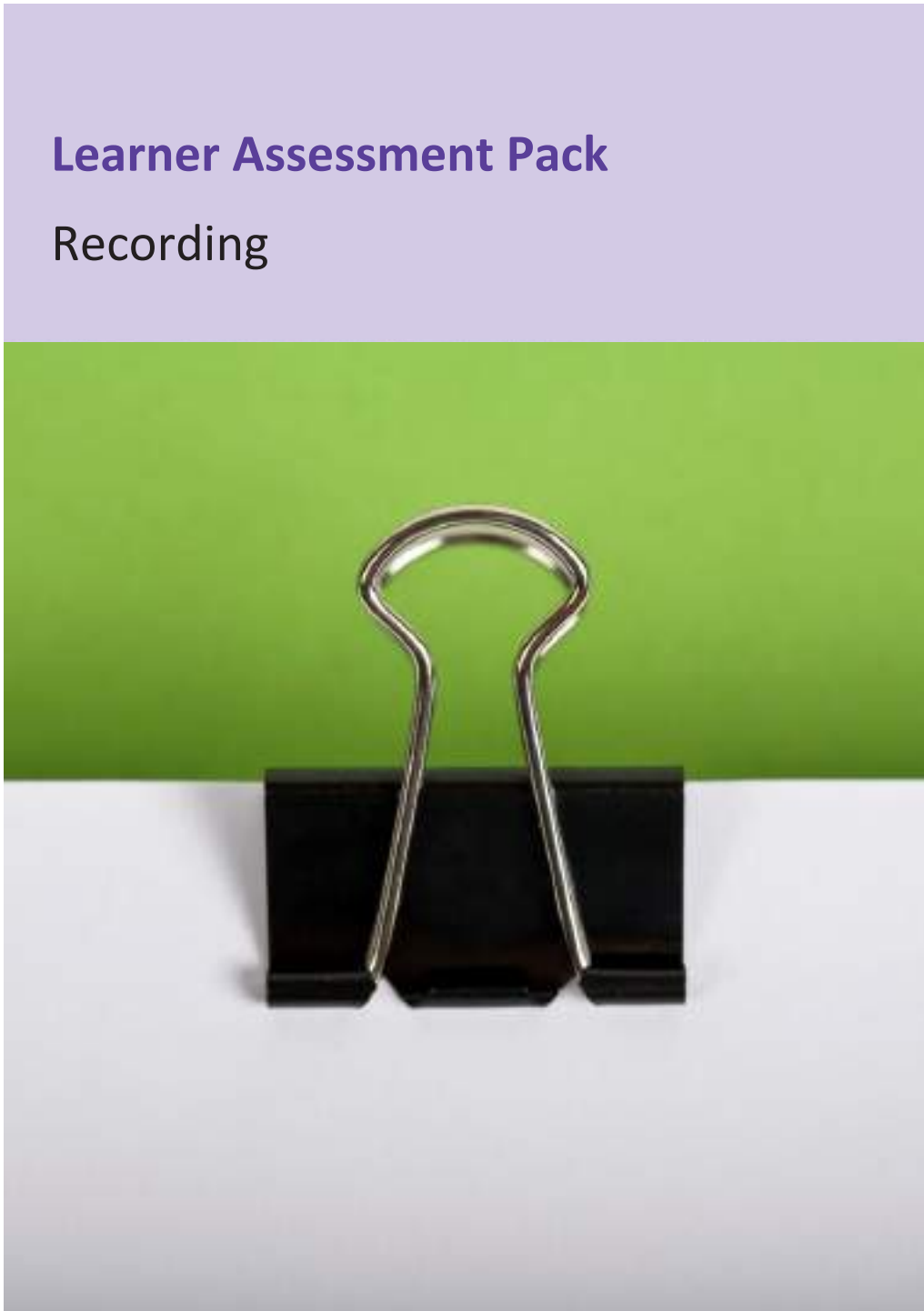


Task 5: Implement and Monitor Business Plan	
Implementation and Monitoring Report, including sign-off	<input type="checkbox"/>
Evidence of reporting to senior management Specify evidence submitted:	<input type="checkbox"/>
Task 6: Review Business Performance	
Business Review Report	<input type="checkbox"/>
Evidence of reporting to senior management Specify evidence submitted:	<input type="checkbox"/>
Task 7: Coach Underperforming Staff	
Observation Form	<input type="checkbox"/>
Video recording of the coaching session Only if direct observation is not possible.	<input type="checkbox"/>



Learner Assessment Pack

Recording





Record of Assessment

Instructions:

This section is to be completed by your assessor.

Assessment Details

Learner	
Course Code	
Unit of Competency	BSBOPS601 - Develop and implement business plans
Assessor Name	
RTO	

Assessment Activity	Satisfactory	Needs more evidence
Short Answer Questions		
Short Answer Question 1	<input type="checkbox"/>	<input type="checkbox"/>
Short Answer Question 2	<input type="checkbox"/>	<input type="checkbox"/>
Short Answer Question 3	<input type="checkbox"/>	<input type="checkbox"/>



Assessment Activity	Satisfactory	Needs more evidence
Workplace Project Assessment		
Task 1: Business Assessment Report	<input type="checkbox"/>	<input type="checkbox"/>
Task 2: Develop Performance Objectives and Measures with Stakeholders	<input type="checkbox"/>	<input type="checkbox"/>
Task 3: Prepare Business Plan	<input type="checkbox"/>	<input type="checkbox"/>
Task 4: Communicate Business Plan	<input type="checkbox"/>	<input type="checkbox"/>
Task 5: Implement and Monitor Business Plan	<input type="checkbox"/>	<input type="checkbox"/>
Task 6: Review Business Performance	<input type="checkbox"/>	<input type="checkbox"/>
Task 7: Coach Underperforming Staff	<input type="checkbox"/>	<input type="checkbox"/>

Context Details	Satisfactory	Needs more evidence
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
Academic, Innovative, Tenacious & Empowerment	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>



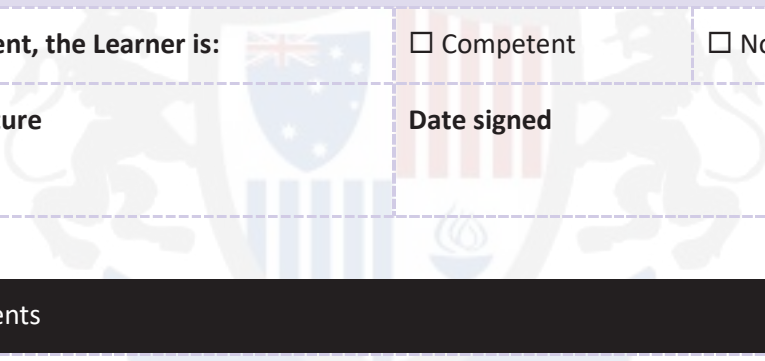
Supervisor/Observer Verification Log					
Supervisor/Observer Name	Role in the Assessment	Contact Details	Date of Contact	Supervisor/Observer verifies the learner's submissions	
				<input type="checkbox"/> Yes	<input type="checkbox"/> No
				<input type="checkbox"/> Yes	<input type="checkbox"/> No
				<input type="checkbox"/> Yes	<input type="checkbox"/> No
				<input type="checkbox"/> Yes	<input type="checkbox"/> No

Assessor's Comments

Remarks/feedback

Details of further evidence required

Please tick the appropriate box.		Yes	No
Comments and further action required are noted in the Learner Assessment Pack		<input type="checkbox"/>	<input type="checkbox"/>
Results discussed and agreed to by the learner You have the right to appeal the outcome of your assessment.		<input type="checkbox"/>	<input type="checkbox"/>
The Learner is		<input type="checkbox"/> Competent <input type="checkbox"/> Not Yet Competent	
Assessor's signature		Date signed	
I further confirm that I have verified the learner's submissions by contacting the learner's supervisor and/or observer whose names appear in the Supervisor/Observer Verification Log above.			
After reassessment, the Learner is:		<input type="checkbox"/> Competent	<input type="checkbox"/> Not Yet Competent
Assessor's signature		Date signed	

Learner's Comments	
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The signature confirms that I have submitted all my own work, and agree with the assessment decision and feedback.	
Learner's signature	Date signed

