



BSB50215 Diploma of Business

Record of Assessment Outcome

Unit of Competency:	BSBMGT517 Manage operational plan		
Student Name:			
Student ID Number:			
Assessor Name:			
Term and Year:			
The student provided evidence of the following assessment task(s):		Yes	No
Assessment 1	Roleplay	<input type="checkbox"/>	<input type="checkbox"/>
Assessment 2	Assignment	<input type="checkbox"/>	<input type="checkbox"/>
Assessment 3	Project	<input type="checkbox"/>	<input type="checkbox"/>
Overall, the student was assessed as:			
Competent <input type="checkbox"/>		Not Yet Competent <input type="checkbox"/>	
Did the student meet the criteria for the following elements of competency?		Yes	No
1. Develop operational plan		<input type="checkbox"/>	<input type="checkbox"/>
2. Plan and management resource acquisition		<input type="checkbox"/>	<input type="checkbox"/>
3. Monitor and review operational performance		<input type="checkbox"/>	<input type="checkbox"/>
The student requires the following skill(s) development before re-assessment:			
Feedback to student on overall performance during assessment:			
The student has been provided with feedback and informed of the assessment result and the reasons for the decision.			
Assessor Name:			
Assessor Signature:		Date:	
I have been provided with feedback on the evidence I have provided. I have been informed of the assessment result and the reasons for the decision.			
Student Name:			
Student Signature:		Date:	

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BSB50215 Diploma of Business

BSBMGT517 Manage operational plan

Assessment 1 – Roleplay

Submission Details			
Student ID Number:			
Student Name:			
Assessor Name:			
Due date:			
Student Declaration:	By signing this declaration, I certify that: <ul style="list-style-type: none">• The assessment work is my own work;• All sources and materials have been acknowledged where required;• I have not copied or plagiarised in any way materials of another person or work of a fellow student and referenced all sources of information.		
Student Signature:			
Assessment Result Details			
Result:	Satisfactory		Not Satisfactory
Feedback to Student:			
Student Declaration:	I have been provided with feedback on my assessment performance/result from Magill College Sydney assessor.		
Student Signature:			
Assessor Signature:			
Date:			



Submission details

The Assessment Task is due on the date specified by your assessor. Any variations to this arrangement must be approved in writing by your assessor. Submit this document with any required evidence attached. See specifications below for details.

Performance objective

In this assessment task, you will demonstrate skills and knowledge required to develop operational plans in consultation with key stakeholders.

Assessment description

In response to a simulated business scenario, you will research resource requirements and develop (or amend) an operational plan in consultation with relevant stakeholders. As a part of the development of your plan, you will set performance indicators, plan for contingencies, and obtain approval in accordance with organisational requirements.

Procedure

1. Read the BBQfun scenario information provided in Appendix 1 and the BBQfun simulated business documentation provided by your assessor.
2. Write a brief summary of the BBQfun operational environment that includes:
 - a. An outline of the legislative and regulatory context that is relevant to BBQfun's operational plan (available on pages 13–15)
 - b. An outline of the BBQfun policies and procedures that directly relate to the operational plan
 - c. An explanation of the role of an operational plan in achieving the successful implementation of the e-commerce strategy
 - d. A discussion of your intention to either develop a new operational plan for BBQfun, or to amend the existing operational plan; support your discussion with reference to different methods and models for developing operational plans – such as methods for setting goals, outlining actions, identifying risk and monitoring performance.
3. Research resource requirements for implementation of e-commerce strategy.
4. Arrange with your assessor to participate in two resourcing consultation role-plays.
5. Participate in consultation role-plays with relevant personnel to determine resourcing needs. You will role-play with the:
 - a. Sales and Marketing Manager – prepare to discuss human resourcing requirements
 - b. Technology consultant – prepare to discuss physical resourcing requirements related to development of e-commerce website.

Note: During consultation, ask questions and encourage the personnel to provide information.
6. Develop an action plan for the implementation of the e-commerce strategy. In your plan include:
 - a. Physical Resourcing (all major steps for resourcing, including procurement of different types of resources, but not to the detail of including all procurement steps for each resource type)
 - b. Human Resourcing (all major steps, e.g. recruiting, training, communication)
 - c. Timelines and milestones for implementing the e-commerce strategy
 - d. Consultation and communication (ensure all affected staff is informed and engagement is encouraged for all stakeholders).



Ensure plans adhere to organisational requirements set out in the scenario and in relevant policies and procedures.

7. Develop performance indicators for operational and financial targets and amend or develop existing operational plans to include KPIs and financial targets related to e-commerce strategy. Develop a balanced scorecard for an e-commerce customer service representative including three KPIs and associated targets. Use the current budget and operational plan as reference provided in Appendix 1.
8. Identify at least three risks to the implementation of the operational plan and develop a contingency plan for each risk (you may use the contingency plan template provided in Appendix 4). Risks must include:
 - a. One risk due to employee underperformance
 - b. One risk related to management of intellectual property (IP)
 - c. One risk due to breach of health and safety compliance responsibilities.
9. Develop a proposal for resourcing to be presented for approval to the Operations General Manager. Include in your proposal:
 - a. Description of proposed implementation of resourcing
 - b. Breakdown of costs
 - c. Benefits to organisation
 - d. A list of different approaches to developing key performance indicators
 - e. Risks to organisation by not implementing
 - f. Outline of identified risks and contingency planning
 - g. Description of sources of information used to develop proposal (use internet research on technical aspects of e-commerce and importance to retailers; use consultation, use company financial projections).
10. Present proposal for approval to the Operations General Manager.

Specifications

You must:

- Participate in two role plays:
 - Consult with the Sales and Marketing Manager
 - Consult with the technology consultant
- Submit a planning portfolio, including:
 - A summary of the operational environment of BBQfun
 - Action plan
 - Performance indicators for operational and financial targets (in the new/amended operational plan)
 - Balanced scorecard for e-commerce customer service representative
 - Proposal for resourcing
 - Email notifying staff and stakeholders
 - Request approval from the Operations General Manager.

Your assessor will be looking for evidence of:

- Reading and writing skills to use workplace information to write an operational plan that meets organisational requirements



- Oral communication skills to present information in a clear and professional manner, listen and comprehend information and confirm understanding through questioning and active listening
- Planning and organisational skills to take responsibility for developing and implementing a plan to achieve operational goals including resource needs, strategy development, sequencing activities, identification of risks and impact on operational performance and generating contingency plans
- Interaction skills to communicate and empathise with stakeholders during consultation processes and collaborate to achieve business outcomes
- Numeracy skills to work with an existing budget to allocate and manage financial resources
- Knowledge of models and methods for operational plans
- Knowledge of the relationship between an operational plan and organisational objectives
- Knowledge of budgeting processes
- Knowledge of legislation and regulations relevant to the operational plan of the organisation
- Knowledge of intellectual property rights and responsibilities relevant to the operational plan
- Knowledge of using KPIs to develop business objectives.

Appendix 1: Scenario – E-Commerce strategy

Background to scenario

The BBQfun Board of Directors and the CEO have decided to implement an e-commerce strategy to maintain or increase market share and revenue and satisfy customer needs in line with company strategic directions.

You have been hired as an external consultant to manage operational planning activities for BBQfun's e-commerce strategy.

Under the strategy, BBQfun would offer all products in an online store. Stock could be stored at no extra cost at existing stores. Customers would cover delivery costs.

Currently, BBQfun has a website, but this website lacks e-commerce functionality. The website would need to be redeveloped to incorporate this functionality in line with relevant technical specifications. Existing infrastructure, such as office and store configurations, would need to be adapted to the new strategy. Additionally, assets, such as delivery vehicles would need to be acquired. New staff would need to be recruited and existing staff retrained or informed of the e-commerce strategy and associated operational and performance targets.

All resourcing must be acquired and operations undertaken in accordance with relevant internal and external standards – legislation and codes of practice; intellectual property (IP) rights and responsibilities; and organisational policies and procedures.

Preliminary approval has been given to amend existing budget and operational planning to incorporate this strategy.

It is now 30 June 2021 and e-commerce operations are expected to be underway in one year and three months, (i.e. by 1 October 2022).

Scenario task

As the external consultant, you will need to determine physical and human resourcing requirements. Review organisational documentation and undertake preliminary research on e-commerce. Consult with the following personnel to determine resourcing needs:

- Sales and Marketing Manager
- Technology Consultant.

You will then need to plan physical and human resourcing and establish associated performance measures and targets. You may consider the Management Team of BBQfun, including team leaders in warehouses, to be resources for the implementation. Use description of their roles in operational planning when assigning responsibilities.

Finally, you will need to propose resourcing and associated operational changes to the Operations General Manager, who will, in consultation with the CEO and Board of Directors, provide approval.

Resourcing and budget: E-Commerce strategy

After consulting with the management team at BBQfun, you determine:

- Eight online sales and customer service people will be needed to manage increased online customers
- Since stores are overstaffed, four of the required customer service staff could be sourced from existing employees at the two stores
- No current staff have any online customer service skills
- Management would like to develop people through re-training rather than hire new staff to handle online sales

- Six delivery trucks needed to enable distribution
- E-commerce website will take 50 days to develop
- Three forklifts are needed
- Four additional warehouse workers are needed
- Six additional drivers are needed
- Office space will need to be reconfigured.

The following operational costs are associated with the e-commerce business strategy.

Costs: e-Commerce strategy (initial investment)	
Resources	Costs
Plant and equipment	<ul style="list-style-type: none"> • Delivery trucks \$50,000 x 6 = \$300,000 • Forklifts \$10,000 x 3 = \$30,000
Promotional costs	\$300,000
Website developers	\$100,000
Staff training	Online customer service training \$3,000 per staff member = \$24,000
Recruitment costs	\$30,000
Management change leadership training for store managers and team leaders	\$3,000 each = 1 Brisbane store manager, 4 Brisbane team leaders, 1 Gold Coast store manager and 3 Gold Coast team leaders x \$3,000 = \$27,000
Warehouse and office reconfiguration	\$50,000
Total	\$861,000

In addition, ongoing staff costs will be incurred.

The expected life of the initial investment is expected to be three years.

Costs: e-Commerce strategy (ongoing)	
Resources	Costs
Additional staff:	(At \$40,000-year average annual salary)
<ul style="list-style-type: none"> • 4 online staff 	4 x \$40,000 (\$160,000) per year for 3 years = \$480,000
<ul style="list-style-type: none"> • 4 warehouse staff 	4 x \$40,000 (\$160,000) per year for 3 years = \$480,000
<ul style="list-style-type: none"> • 6 delivery drivers 	6 x \$40,000 = \$240,000 per year for 3 years = \$720,000
Total	\$1,680,000

The following expenses should be incurred in the 2022 financial year and be included in associated financial targets for spending:

Additional staff	\$400,000
Additional marketing	\$300,000
Additional training	\$51,000
Recruitment	\$30,000

Benefits to business

As per the financial projection prepared by the CFO, the business expects the proposed strategy to be profitable over three years.

Profitability index over three years

$$\text{Profitability index (PI)} = \frac{\text{Present value (PV) of future cash flows}}{\text{Present value (PV) of initial investment}}$$

PI > 1 indicates project should be undertaken

	FY 2022	FY 2023	FY 2024
Cash flow from operations (minus ongoing operational costs associated with e-commerce such as additional staffing)	\$200,000	\$500,000	\$800,000
Present value of future cash flows (discounted future cash flows with respect to opportunity cost, inflation)	\$180,000 + \$420,000 + \$600,000 = \$1,200,000		
Present value of initial investment	\$861,000		
Profitability index	1.39		

The expected additional profit for 2022 would be \$200,000. This figure should be added to targets.

Risks to implementation

After consulting with stakeholders at BBQfun, you determine:

- Medium risk of poor online sales
- High risk of customer service quality problems for online customers leading to a breach of consumer law
- High risk of staff misunderstanding changes and considering online sales as threat to jobs
- Medium risk of not being able to recruit fully trained online staff
- Low risk of loss of IP relating to confidential information contained within the e-commerce strategy when employees leave the organisation
- Medium risk of loss of IP ownership if a relationship with the website developer contract ceases
- Low level risk of not complying with WHS legislation through lack of risk assessment conducted on potential musculoskeletal disorders resulting from poor customer service workstation design
- Medium risk of wastage due to overstocking product in anticipation of increased online sales.

All additional costs associated with contingency planning will be approved in accordance with BBQfun policies and procedures.



Budget summary

BBQfun FY 2021–22 Approved budget by activities to be undertaken

Income:		
Sales	\$11,000,000	Barbecues and related equipment.
Investment income	\$1,567,000	Real estate investment income and rental of office space.
Cost of goods sold (COGS)	(\$5,890,000)	Cost of provision of goods, purchase of stock, distribution.
Gross profit	\$6,677,000	Gross profit.
Expenses:		
Wages, salaries and on costs	\$2,567,890	Wages, salaries, superannuation, work cover insurance, payroll tax.
Consultancy fees	\$50,000	Project management: WHS management system; change management.
Communication expenses	\$42,000	Telephone, ISP costs, IT support.
Marketing	\$920,000	Cost of staff travel and associated costs for sales, etc.
Premises expenses	\$1,000,000	Rent, electricity, maintenance, cleaning.
Insurance	\$120,000	Liability insurance
Depreciation and amortisation	\$177,569	Computers and capital equipment that is depreciated.
Office supplies	\$65,068	Printing and stationery, postage, amenities.
Training	\$62,187	Sales training: leadership, WHS, ethical/legal training.
Total expenses	\$5,004,714	
Net profit	\$1,672,286	Net income before tax.

Operations

General operating hours

BBQfun operates Monday to Friday from 9 am to 5 pm. BBQfun will be operational year-round except legislated holidays.

Human resources

Pat Mifsud, CEO

Pat is responsible for working with the Board of Directors to oversee the business, set overall strategic directions, manage risk, and authorise large financial transactions.

Riz Mehra, Chief Financial Officer

Riz is responsible for preparing quarterly financial statements and overall budgeting. Riz is also responsible for overseeing budgets for cost centres and individual projects. At completion of financial quarters and at the end of projects, Riz is responsible for viewing budget variation reports and incorporating information into financial statements and financial projections.

Kim Chen, Operations General Manager

Kim is responsible for the day-to-day running of the company. Kim oversees the coordination of all operations. Kim is responsible for sponsoring projects that affect



operations of the organisation. Kim works with the HR Manager to coordinate systems and projects to achieve company-wide synergy.

Les Goodale, Human Resources (HR) Manager

Les is responsible for the productive capacity and welfare of people at BBQfun. With the Operations General Manager, Les works to coordinate projects and management systems, such as performance management, recruitment and induction.

Sam Lee, Marketing Manager

Sam is responsible for the management of all aspects of marketing. Sam manages the activities of the marketing team.

Pat Sweeney, Manager: Brisbane (Kenmore)

Pat is responsible for the management of all aspects of the Brisbane store.

Alex Mitchell, Manager: Gold Coast

Alex is responsible for the management of all aspects of the Gold Coast store.

A summary of human resources at each of the two locations appears below:

Brisbane: Head office

- Employees:
 - 30 full-time and casual sales and customer service people, check-out staff trained in use of POS – integrated with ERP (enterprise resource planning) and CRM (customer relationship management) software system
 - Senior management team (five) + one store manager
 - Four sales team leaders
 - One delivery truck driver
 - One warehouse worker.

Gold Coast operation

- Employees:
 - 30 full-time and casual sales and customer service people, check-out staff trained in use of POS – integrated with ERP (enterprise resource planning) and CRM (customer relationship management) software system
 - One store manager
 - Three sales team leaders
 - One delivery truck driver
 - One warehouse worker.



Office requirements

The office space is leased and will accommodate the necessary office equipment, such as computers, photocopier and other engineering equipment.

Brisbane: Head office

- Location: Kenmore.
- Size: 15,000 square metres (50% warehouse, 50% display area). Warehouse area used at 45% of capacity, but poorly configured to accommodate heavy increase in distribution traffic.
- Large mezzanine office space (used to be occupied by online retailer, currently subdivided and occupied by the management team).
- Loading bay with large capacity (most of area incorporated into customer display area, could be easily and cheaply reconfigured to accommodate extra distribution).

Gold Coast operation

- Location: Robina.
- Size: 12,000 square metres (50% warehouse, 50% display area). Warehouse area used at 50% of capacity, but poorly configured to accommodate heavy increase in distribution traffic.
- Large mezzanine open-plan office space with separate access (was previously rented out to a telemarketing company).
- Lots of spare office space.
- Loading bay with large capacity.

Operating capital requirements

BBQfun requires approximately five million dollars in working capital to sustain and ensure the business meets all opening and ongoing financial obligations. The company may experience financial pressures during slow sales periods.

A long-term strategy to maintain a positive cash flow during these periods will be to diversify the company's product range and develop business opportunities such as e-commerce to boost sales and sales capability overall.

Operational expenses	
Wages, salaries and on-costs	\$2,567,890
Consultancy fees	\$50,000
Communication expenses	\$42,000
Marketing	\$920,000
Premises expenses	\$1,000,000
Insurance	\$120,000
Depreciation and amortisation	\$177,569
Office supplies	\$65,068
Training	\$62,187
Total Expenses	\$5,004,714



Insurance requirements

BBQfun will incur costs for business liability insurance. The estimated cost for this requirement is \$100,000 per year.

Operational workflow

1. Conduct market research to determine needs.
2. Negotiate with suppliers.
3. Receive and warehouse products.
4. Provide service and information to warehouse customers.
5. Receive payment.
6. Arrange delivery of items (if required).

BBQfun accepts cash, EFTPOS and major credit cards. Credit terms are available for trades.



Operational plan FY 2021–2022

BBQfun Operational Plan (with strategic objectives, measures and tasks) FY 2021–2022

Objectives:	Performance measures	Tasks:
1 Engaging with customers through marketing, research and personalised service.	<ul style="list-style-type: none">• Completion of market/marketing research.• Completion of customer surveys.• Completion of reports to identify marketing opportunities.	<ul style="list-style-type: none">• Conduct quarterly surveys on customer satisfaction.• Evaluation of market and marketing data to determine marketing opportunities.



BBQfun Operational Plan (with strategic objectives, measures and tasks) FY 2021–2022

Objectives:	Performance measures	Tasks:
<p>2 Building reputation for quality products and quality customer service:</p> <ul style="list-style-type: none"> • Raise organisational profile by 20%. • Improve client satisfaction performance by 25%. 	<ul style="list-style-type: none"> • Percentage of brand recognition in sought-after categories in periodic customer surveys. • Percentage of customers with positive view of organisational responsiveness, innovation, quality, ethics, safety. • Number of customer complaints. • Delivery times. • Number of returned items. 	<ul style="list-style-type: none"> • Audit of supplier quality. • Regular contact with suppliers. • Investigate resourcing needs: people, products. • Fulfil resourcing and distribution needs in accordance with policies and procedures. • Maintenance of enterprise resource management (ERP), point of sale (POS) and customer relationship management (CRM) systems.



BBQfun Operational Plan (with strategic objectives, measures and tasks) FY 2021–2022

Objectives:	Performance measures	Tasks:
<p>3 Supporting people to perform via training and performance management.</p>	<ul style="list-style-type: none"> • Numbers of injuries (Target = 0). • Numbers of absentees (Target = <3% of total hours). • Anti-discrimination complaints (Target=0). • Lost Time Injury Frequency Rate (Target=2) • Percentage completion of performance plans and performance management process. • Numbers of coaching sessions completed. • Numbers of operational-related training programs completed. 	<ul style="list-style-type: none"> • Research effectiveness of possible incentives for: safe work achievement; healthy lifestyle. • Engage workers with strategic goals of business and support professional development in line with strategic goals. (Targets to be set by individual managers). • Management engagement with employees to achieve greater buy-in of organisational goals. • Include explanation of how activities work with organisational strategic goals in all communications to internal personnel. • Regular coaching. • Training needs analysis and training (leadership, WHS, ethical/legal training). • Strategic goals included in induction program. • Employee incentives for performance in all areas relevant to operational and strategic goals.



Magill College Pty Ltd Trading as Magill College Sydney

ABN: 67 090 050 990

CRICOS Provider Code: 01994M RTO No: 91367

Tel: (+61 2) 8061 6980 www.magill.edu.au

BBQfun Operational Plan (with strategic objectives, measures and tasks) FY 2021–2022

Objectives:	Performance measures	Tasks:
4 Increasing sales revenue.	General ledger accounts; financial statements: <ul style="list-style-type: none"> • Revenue target = \$11 million • Profit target = \$1,792,286 	<ul style="list-style-type: none"> • Marketing campaigns. • Sales training for floor staff.
5 Reduce direct and indirect costs of operations.	<ul style="list-style-type: none"> • General ledger accounts; financial statements: <ul style="list-style-type: none"> ○ wages ○ cost of agent services ○ consultancy fees ○ wastage and associated expenses. • Expense target = \$5,004,714 • COGS target = \$5,890,000 	<ul style="list-style-type: none"> • Renegotiate with suppliers. • Research potential new suppliers. • Research new distribution possibilities, such as e-commerce/delivery. • Management engagement with employees to achieve greater employee support of organisational goals. • Greater use by managers of budgets to encourage restraint. • Greater focus on budget restraint in management of projects/activities. • Inventory management through ERM to reduce overstocking and risk associated with storage. • Incentives (as part of manager/employee performance management and bonus system).



Appendix 2 – Action plan template

Milestone: Action and/or objective <i>(to achieve strategic aims of physical or human resourcing)</i>	Date	Person responsible	Budget or resources <i>(where applicable)</i>



Appendix 3 – Balanced scorecard template

KRA (key result area)	Target	KPI (key performance indicator)	Result



Appendix 4 – Contingency plan template

Contingency Plan		
Company name: BBQfun		
Name of person developing the plan:		
Who was consulted as part of this plan?		
Name	Position	
Risk identified:		
Strategies/activities to minimise the risk	By when	By whom



BSB50215 Diploma of Business

BSBMGT517 Manage operational plan

Assessment 2 – Assignment

Submission Details			
Student ID Number:			
Student Name:			
Assessor Name:			
Due date:			
Student Declaration:	By signing this declaration, I certify that: <ul style="list-style-type: none">• The assessment work is my own work;• All sources and materials have been acknowledged where required;• I have not copied or plagiarised in any way materials of another person or work of a fellow student and referenced all sources of information.		
Student Signature:			
Assessment Result Details			
Result:	Satisfactory		Not Satisfactory
Feedback to Student:			
Student Declaration:	I have been provided with feedback on my assessment performance/result from Magill College Sydney assessor.		
Student Signature:			
Assessor Signature:			
Date:			



Submission details

The Assessment Task is due on the date specified by your assessor. Any variations to this arrangement must be approved in writing by your assessor. Submit this document with any required evidence attached. See specifications below for details.

Performance objective

In this assessment task, you will skills and knowledge required to plan and manage resource acquisition.

Assessment description

In response to a simulated business scenario, and using work completed in Assessment Task 1, you will develop and implement strategies to ensure physical and human resourcing is carried out in accordance with organisational policies, practices and procedures and intellectual property (IP) provisions.

Procedure

1. Read the BBQfun simulated business information provided in Appendix 1 of Assessment Task 1.
2. Plan and implement physical resourcing:
 - a. Review the physical resourcing activities in the action plan you developed in Assessment Task 1.
 - b. Elaborate on your plan by including all steps and strategies to acquire resources in accordance with organisational requirements.
 - c. Explain the risk management strategy needed to protect the organisation's IP and/or ensure the organisation does not breach third-party IP.
3. Plan and implement human resourcing:
 - a. Review the human resourcing activities in the action plan you developed in Assessment Task 1.
 - b. Elaborate on your plan by including all steps and strategies to recruit people in accordance with organisational requirements.
 - c. Incorporate IP requirements for human resource acquisition to ensure trade secrets and confidential information is protected from theft, misuse and unauthorised distribution.
 - d. Prepare to interview two recruits by organising a role-play interview with each and preparing paperwork.
 - e. Interview, assess and make recommendations on two potential recruits in accordance with your plan. You may use the templates provided or develop your own.
4. Submit a portfolio of your implementation documents as outlined in the specifications below. Keep copies of your work for your records.

Specifications

You must:

- Participate in two interview role-plays
- Submit a portfolio including:
 - Action plans (Appendix 2)
 - Interview plan (Appendix 4)
 - Assessment and evaluation record with recommendations.



Your assessor will be looking for evidence of:

- Reading and writing skills to access and use workplace information and to write a detailed resource acquisition plan using vocabulary, grammatical structures and conventions appropriate to the context.
- Writing and numeracy skills to complete planning documentation
- Planning and organisational skills to identify IP risks and take responsibility for implementing a physical and human resource acquisition plan to achieve operational goals
- Communication skills to present information using clear and professional English, listen and comprehend information from interviewees and confirm understanding through questioning and active listening skills
- Monitoring skills to identify the implications and requirements for protecting IP
- Interaction skills to communicate and empathise with candidates during interview processes, facilitate one-on-one interviews and influence direction to achieve business outcomes
- Knowledge of organisational resource acquisition policies, practices and procedures.



Appendix 1: Scenario – E-Commerce resourcing

Background to scenario

The BBQfun Board of Directors and the CEO have decided to implement an e-commerce strategy to maintain or increase market share and revenue and satisfy customer needs in line with company strategic directions.

You have been hired as an external consultant to manage operational planning activities for BBQfun's e-commerce strategy.

Under the strategy, BBQfun would offer all products in an online store. Stock could be stored at no extra cost at existing stores. Customers would cover delivery costs.

Currently, BBQfun has a website, but this website lacks e-commerce functionality. The website would need to be redeveloped to incorporate this functionality in line with relevant technical specifications. Existing infrastructure, such as office and store configurations, would need to be adapted to the new strategy. Additionally, assets such as delivery vehicles would need to be acquired. New staff would need to be recruited and existing staff retrained or informed of the e-commerce strategy and associated operational and performance targets.

All resourcing must be acquired and operations undertaken in accordance with relevant internal and external standards – legislation and codes of practice; intellectual property (IP) rights and responsibilities; and organisational policies and procedures. High-level planning has been completed and approval has been given to implement the strategy.

As per the plans, you are now at the stage where you must plan and then implement the resourcing required to enable the strategy. Physical resourcing and human resourcing are about to commence. Remember, e-commerce operations are expected to be underway by 1 October 2022.

Scenario task

You will need to plan physical and human resourcing at a detailed level in accordance with all organisational requirements. You are expected to deploy resourcing strategies to plan and implement:

- Physical resourcing of redeveloped website (plan entire process as per organisational requirements)
- Recruitment of four customer service representatives (plan entire recruitment process as per organisational requirements; you will need to demonstrate implementation through interviewing and assessing two candidates).

Note: You may consider the management team of BBQfun, including warehouse team leaders to be human resources for the acquisition of physical resources. Use description of their roles in operational planning when assigning responsibilities.

Physical resourcing

Consultation with the management team at BBQfun has provided you with the following information:

- Three website developers will bid for the contract to redevelop the existing website:

Company	Bid
Ace developers	\$70,000
Premier Tech	\$80,000
Innovative Technologies	\$90,000

- The budget for the redevelopment is \$100,000.
- Bids have been analysed as follows.

Factor	Weight	Ace Developers		Premier Tech		Innovative Technologies	
		Score (S)	Weighted score (W x S)	Score (S)	Weighted score (W x S)	Score (S)	Weighted score (W x S)
Maintenance	x1	2	2	3	3	3	3
Range of features: <ul style="list-style-type: none"> • payment options • integration with existing systems 	x3	2	6	2	6	2	6
Future-proofing: <ul style="list-style-type: none"> • ability to be upgraded as technology improves 	x5	3	15	6	30	6	30
Quality: <ul style="list-style-type: none"> • usability for customers 	x10	4	40	4	40	6	60
Total			63		79		99
Price (% of budget)			.70		.80		.90
Total score/price (final assessment of bid quality)			90		98.75		110



Human resourcing

Consultation with the management team at BBQfun has provided you with the following information:

- The budget for recruitment of four online customer service and sales representatives is \$30,000. The breakdown of costs is as follows:

Advertising	\$5,000
Recruitment consultant	\$10,000
Your time	\$10,000
Contingency	\$5,000

- You now have three suitable online customer service and sales representatives.
- You have two more candidates to interview.
- The candidate is required to have the following skills and attributes:
 - Enthusiastic and motivated
 - Attention to detail
 - Compliance with organisational requirements
 - Takes initiative
 - Problem solver
 - Two years' experience in online sales
 - Telephone and keyboarding skills
 - Ability to learn features and benefits of products to discuss with customers.
- The following skills and attributes are not strictly required, but desired:
 - Marketing and sales formal training
 - Knowledge of BBQfun's product line
 - Familiarity with CRM systems.



Appendix 2: Action plan

Milestone: Action and/or objective <i>(to achieve strategic aims of physical or human resourcing)</i>	Date	Person responsible	Budget or resources <i>(where applicable)</i>



Appendix 3: Expenditure payment approval plan

<i>For completion by person verifying payment:</i>	
Date	Invoice date
Payee name:	
Job/project number:	Project title:
Description of payment:	
Payment amount: \$	<input type="checkbox"/> ex. GST <input type="checkbox"/> incl. GST
_____	_____
Signature of person verifying payment	Signature of delegated manager

<i>For completion by finance:</i>		
Account number	Account name	Amount
Total Payable:		\$
Approved:	Date:	
<i>Director:</i>	_____	_____
<i>CEO:</i>	_____	_____
<i>Finance manager:</i>	_____	_____



Appendix 4: Interview planning

Planning aspect	Description	Time
1. Type of interview		
2. Objectives		
3. Approach and style		
4. Schedule		
5. Topics and questions		

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BSB50215 Diploma of Business

BSBMGT517 Manage operational plan

Assessment 3 – Project

Submission Details			
Student ID Number:			
Student Name:			
Assessor Name:			
Due date:			
Student Declaration:	By signing this declaration, I certify that: <ul style="list-style-type: none">• The assessment work is my own work;• All sources and materials have been acknowledged where required;• I have not copied or plagiarised in any way materials of another person or work of a fellow student and referenced all sources of information.		
Student Signature:			
Assessment Result Details			
Result:	Satisfactory		Not Satisfactory
Feedback to Student:			
Student Declaration:	I have been provided with feedback on my assessment performance/result from Magill College Sydney assessor.		
Student Signature:			
Assessor Signature:			
Date:			



Submission details

The Assessment Task is due on the date specified by your assessor. Any variations to this arrangement must be approved in writing by your assessor. Submit this document with any required evidence attached. See specifications below for details.

Performance objective

You will demonstrate skills and knowledge required to monitor and review operational performance.

Assessment description

In response to a simulated business scenario, and using work completed in Assessment Task 1, you will develop, monitor and review performance systems, analyse performance, identify areas of underperformance, take prompt remedial action and report on operational performance.

In accordance with contingency planning developed in Assessment Task 1, you will take prompt action to address employee underperformance. In a role-play, you will coach the employee in accordance with performance management systems.

You will then prepare and present, in a second role-play, a management report describing the performance system, performance results and recommendations for changes to operational plans. During the role-play, you will negotiate changes to operational plans and gain approval for recommendations from the Operations General Manager (the facilitator/assessor).

Procedure

1. Read the simulated BBQfun scenario information provided in Appendix 1 of this task.
2. Prepare a plan for monitoring performance from the start of implementation to the end of the financial year. Ensure you include plans for monitoring and/or documenting:
 - a. Budgetary and financial performance
 - b. Productivity performance
 - c. Employee performance in line with performance management policy
 - d. Milestone achievement and performance against targets
 - e. Dates for monitoring activities in line with scenario
 - f. Resources for monitoring
 - g. Progress reporting at the end of each quarter to the Operations General Manager
 - h. Regular performance management of online staff and lodgement of records with the HR manager.
3. Identify areas of employee underperformance, determine possible remedial actions and prepare to performance manage underperforming employees. Refer to, follow, or adapt, existing contingency plan for underperforming employees developed in Assessment Task 1.
4. Follow your contingency plan and the BBQfun performance management policy to coach and performance manage an underperforming employee. Arrange with your assessor to role-play the coaching session. Make sure you begin a coaching session with an explanation of your role as a coach in supporting the employee to meet BBQfun's organisational goals.



5. Analyse operational performance as described in scenario, and produce an operational plan status report based on the information provided in Appendix 1. You will also need to include in your report:
 - a. A description of budgetary and financial performance
 - b. A description of productivity performance
 - c. An analysis of milestone achievement and performance against targets
 - d. Three recommendations for operational improvement.
6. Present your report to the Operations General Manager and negotiate recommendations – involving, for example, changes to plans, changes to implementation of plans, changes to budget, etc. – and seek approval for the implementation of your recommendations.
7. Submit a portfolio of your implementation documents as outlined in the specifications below. Keep copies of your work for your records.

Specifications

You must:

- Participate in one role-play:
 - Coaching an underperforming employee.
- Submit a portfolio that includes:
 - A monitoring plan
 - A contingency plan (amended from assessment task 1) for managing employee underperformance (Appendix 2)
 - A coaching and performance management plan (Appendix 3 and 4)
 - An operational plan status report (Appendix 5), including:
 - A description of budgetary and financial performance
 - A description of productivity performance
 - An analysis of milestone achievement and performance against targets
 - Three recommendations for operational improvement.
- Presentation of report to Operations General Manager

Your assessor will be looking for evidence of:

- Reading and writing skills to access, interpret and use workplace information and to write a practical monitoring plan and management report
- Oral communication skills to present information in a clear and professional manner to underperformers and management, listen and comprehend information and confirm understanding through questioning and active listening
- Planning and organisational skills to take responsibility for monitoring an operational plan to determine performance against operational goals
- Leadership skills to communicate with and motivate underperformers, facilitate performance management discussions and collaborate to achieve business outcomes
- Numeracy skills to monitor expenditure of financial resources
- Knowledge of models and methods for operational plans
- Knowledge of the relationship between an operational plan and organisational objectives
- Knowledge of budgeting processes.



Appendix 1: Scenario – E-Commerce performance monitoring

Background to scenario

The BBQfun Board of Directors and the CEO have decided to implement an e-commerce strategy to maintain or increase market share and revenue and satisfy customer needs in line with company strategic directions.

You have been hired as an external consultant to manage operational planning activities for BBQfun's e-commerce strategy.

Under the strategy, BBQfun would offer all products in an online store. Stock could be stored at no extra cost at existing stores. Customers would cover delivery costs.

The BBQfun website now has e-commerce functionality. The website has been redeveloped to incorporate this functionality in line with relevant technical specifications after you consulted with specialist managers. Existing infrastructure, such as office and store configurations, has been adapted to the new strategy. Additionally, assets such as delivery vehicles have been acquired. New staff has been recruited and existing staff retrained or informed of the e-commerce strategy and associated operational and performance targets.

All resourcing should have been acquired and operations undertaken in accordance with relevant external standards, such as legislation and codes of practice, and internal standards, such as organisational policies and procedures and performance targets.

It is now 1 January 2021. E-Commerce operations are expected to be underway by 1 October 2022.

Scenario task

You will need to plan monitoring activities for ongoing customer service activities, website maintenance, and revenue generation over the financial year from the start of implementation.

You will then need to analyse performance data for the second quarter of the financial year. You will then need to coach an underperforming employee in accordance with the BBQfun performance management policy and previously developed contingency planning (the planning developed for Assessment Task 1).

Finally, you will need to prepare and present a report with recommendations for operational improvement to the Operations General Manager.

Note: You may consider the management team of BBQfun including team leaders in warehouses to be resources for the monitoring of performance. Use description of their roles in operational planning when assigning responsibilities.

Note: Financial reporting is completed by the CFO at the end of each quarter of the financial year. Employee performance is gathered by store managers, sales and marketing managers (online staff) and compiled by the HR Manager at the end of each quarter.

Individual performance data

The following performance data is available for Lee Waters:

KRA	Target	KPI	Result
Quality of online sales and service	1% error rate	% of informational or order mistakes	10%
Speed of service (online)	<10 minutes per interaction	Average time to completion	20 minutes
Financial	\$30,000 sales	\$ sales	\$20,000
Professional development	Participate in 2 hours of sales training per month.	Training hours	0 hours

Organisational performance

Information from the Sales and Marketing Manager

A discussion with the Sales and Marketing Manager has provided you with the following information.

The Sales and Marketing Manager has been tracking progress against the following key performance indicators (KPIs):

1. Quality of online sales and service is measured in: % of mistakes made by a customer service employee when providing information or making an order. The target is 1%. Currently the rate of mistakes made is 10%.
2. Speed of online sales and service is measured in average time to resolve a customer enquiry. The target is <10 minutes. Currently, the average time to complete an online enquiry is 20 minutes.
3. Average delivery speed is measured in the average time in days from the order being made to the customer receiving delivery of the product. The target is three days from order to delivery. Currently, the average delivery speed is three days.
4. Revenue success is measured in the amount of revenue generated in dollars. The target is \$300,000 in sales per quarter, which would make an \$80,000 profit per quarter. In the second quarter this financial year, we generated \$250,000 in revenue, providing a profit of \$40,000 for the quarter.

Further to the KPIs, the Sales and Marketing Manager provides more information on each area of performance.

Quality of online sales and service:

- Staff not familiar with product line, even after training.
- Staff do not understand CRM (customer relationship management) systems and ordering processes.
- Staff do not understand product line. Unable to locate information.
- Poor communication lines.
- No job aids or support from management.
- No ongoing performance management as per company policy.
- Low staff morale: complaints of back pain and distractions in environment.



Speed of online sales and service:

- Many customers abort interaction due to length of time for order completion.
- Some extra time taken because of lack of skills and knowledge.
- Considerable time taken because of poor website maintenance and occasional downtime.

Speed of delivery:

- Driver team leader is exceptional motivator.
- Driver morale is high.
- Driver attendance of routine training and team briefings is at 100%.

Online sales and revenue:

- Some lack of sales may be due to poor customer service.
- Sales may pick up as awareness of online option through marketing actions increases.

In terms of our key actions, we're tracking well. The website redevelopment has been completed on time and to budget. The delivery trucks and forklifts have been acquired and put into operation on time. In terms of recruitment, staff have been recruited on time, and the planned training has been completed.

Information from the Chief Finance Officer (CFO)

A discussion with the CFO has provided you with the following information:

The CFO has been tracking progress against the following key performance indicators (KPIs):

1. Budget success is measured in % overrun/underspend. The target is 0% overrun. Currently there is a budget overrun of 10%. Cost overruns are due to:
 - wastage from order mistakes and over-stocking due to misuse of system!
 - overtime due to overly long customer interactions.
2. The timeline for the e-commerce project is to have the e-commerce activities implemented by 1 October 2022. Currently the implementation is on track.

In addition to these key performance indicators, we have identified a number of risks that all need immediate action:

- The training program has not been adequate to cover required skills and knowledge. Training has been too short and insufficient to be effective.
- Staff are unable to perform roles due to lack of support in job roles and ongoing training and coaching.
- Website downtime contributes to increased service and sales disruptions.
- Sales continue to perform under target.

On that last risk, sales may need to be more closely monitored. Customer needs and changing market conditions/competition may need to be reassessed and addressed.



Appendix 2: Contingency plan

Contingency Plan

Company name: BBQfun

Name of person developing the plan:

Who was consulted as part of this plan?

Name	Position
-------------	-----------------

Risk identified:

Strategies/activities to minimise the risk	By when	By whom
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Appendix 3: Performance management plan

Name/position:		Manager:		Review period:	
Reference from operational plan	Key result area	Indicator of success/performance	By when	Status report	
Manager's comments:		Signature:			
		Date:			
Staff member's comments:		Signature:			
		Date:			



Appendix 4: Coaching plan

Employee:	
Coach/Manager:	
Date of session:	
	Questions
Goal	
Reality	
Options	
Will	



Appendix 5: Operation plan status report

BBQfun operation plan status report		Date:	
Plan goal	Implement e-commerce strategy	Department	Operations
Plan objective/s	<ul style="list-style-type: none"> • redevelop website and acquire physical resources • recruit and train staff • achieve profit targets • adhere to budget • adhere to timelines. 	Person responsible	Project Officer
Key performance indicators		Current status (Red, Green, Amber)	Comments



Key action update

Key action	Accomplishments	Comments

Risk update

Risk	Contingency	Comments
1.		
2.		
3.		
4.		

General comments

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