



BSB50215 Diploma of Business

Record of Assessment Outcome

Unit of Competency:	BSBADM506 – Manage business document design and development		
Student Name:			
Student ID Number:			
Assessor Name:			
Term and Year:			
The student provided evidence of the following assessment task(s):		Yes	No
Assessment 1	Assignment	<input type="checkbox"/>	<input type="checkbox"/>
Assessment 2	Portfolio of Activities	<input type="checkbox"/>	<input type="checkbox"/>
Assessment 3	Written Report	<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. Establish documentation standards		<input type="checkbox"/>	<input type="checkbox"/>
2. Manage template design and development		<input type="checkbox"/>	<input type="checkbox"/>
3. Develop standard text for documents		<input type="checkbox"/>	<input type="checkbox"/>
4. Develop and implement strategies to ensure the use of standard documentation		<input type="checkbox"/>	<input type="checkbox"/>
5. Develop and implement strategies for maintenance and continuous improvement of standard documentation		<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

BSBADM506 – Manage business document design and development

Assessment 1 – 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 plagiarized 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 identify and establish document standards in an organisational context.

Assessment description

You will answer and submit written answers to four questions based on a simulated business case study and scenario information provided.

Procedure

1. Read the scenario in Appendix 1 and make sure you have received the Adept Owl simulated business documentation provided by the assessor.
2. Read through the questions provided in Appendix 2 of this task.
3. Respond to the questions by referring to the Adept Owl simulated business documentation provided by your assessor in Appendix 1.
4. Submit written answers to your assessor within an agreed timeframe and in an agreed format. Ensure your answers reflect specifications as outlined below. Keep copies of all submitted materials for your records.

Specifications

You must submit:

- Written answers to four questions (provided in Appendix 2).

Your assessor will be looking for responses to questions that demonstrate:

- Literacy skills to read and interpret policies and procedures
- Research and analysis skills to evaluate content, structure and purpose of technical texts, and to adapt task instructions to suit changes in technology
- Knowledge of cost constraints and document production processes
- Knowledge of key provisions of relevant legislation and regulations, codes and standards that may affect aspects of business operations, such as:
 - Anti-discrimination legislation
 - Privacy laws
 - Ethical principles
 - Codes of practice
- Demonstrate knowledge of how to locate experts which are external to the organisation or workgroup.



Appendix 1 – Adept Owl scenario

Background

Adept Owl produces high-quality, entertaining board, card and puzzle games for the enjoyment of all ages. According to the company's vision, Adept Owl intends to establish its reputation within five years, 'as one of the finest, most innovative and entertaining board game developers in Australia'. To achieve this goal, the company will need to engage in several strategic directions:

- Engaging with customers
- Developing and improving products and production
- Supporting innovative thinking, management and leadership skills
- Creating a high-performing organisation
- Ensuring sustainable materials and processes are used in manufacture and distribution.

On the level of creating, maintaining and storing company documentation, these strategic directions are supported by specific activities, for example:

- Creating standards for documents, in the form of a style guide, to improve readability (for internal and external customers) and to promote a consistent look-and-feel
- Creating procedures for document production that ensure consistent, high-quality outcomes and efficiency
- Designing templates and standard text – in conformity with the style guide and production procedures – to improve workflow further
- Developing people-focused implementation strategies – for example delivering training on documentation – to ensure the cooperation of all staff in the maintenance of document quality, sustainability, and legal and ethical compliance.

As a new member of the administration team, with a responsibility for team leadership and document design and development, your first order of business is to identify the existing documentation standards at Adept Owl. In order to plan for meeting current and future organisational needs, you will need to consider current performance and administration team capability.



Administration team performance

The administration team at Adept Owl performs a range of documentation tasks. These tasks are grouped into several main areas of activity, which provide the basis for measuring performance that drives organisational outcomes. The administration team at Adept Owl uses the following performance scorecard, which includes various targets for documentation output and quality.

Performance area	Performance metric (KPI)	Target	Outcomes
Customer focus	Per cent of documents conforming to the style guide	100%	?
Productivity	Average time (per mail-out) to edit the letter being sent	30 minutes	?
	Average time per mail merge	5 minutes	?
	Data entry error rate	3%	?
Employee development	Number of training hours per employee	20hrs per employee per quarter	?
Expense	Average cost per mail-out (excluding postage)	\$100	?
	Average labour cost per page of edited text	\$50	?
Sustainability	Average sheets of paper used per letter	3 sheets	?
	Average toner use per quarter	10 cartridges	?
Compliance	Identified breaches of legislation, including WHS/OHS, anti-discrimination, privacy	0 incidents	?
	Privacy related complaints	0 incidents	?

Administration team capability

The administration team has identified six key skills that each team member will need to perform at a practitioner level (see the legend for clarification of levels) or above:

Team member and current capability

Work task	You (team leader)	Pat	Sam	Kim
Creating and using templates in Word and Excel.				
Creating and using macros in Word and Excel.				
Creating and using mail merge features in Word.				



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Creating and using form fields in Word.				
Creating and using drop down lists in Excel.				
Creating and using formulae in Excel.				

Legend:

	Untrained – Team member has no training.
	Learner – Team member cannot perform task independently.
	Practitioner – Team member can perform task independently with supervision.
	Operator – Team member can perform task independently.
	Coach – Team member can train others to perform task.

Current business needs

In attempting to achieve its wider business goals, Adept Owl has a number of current specific business needs relating to the skills capability and performance of the administration team in designing and using documentation.

Letter mail-outs

One of the most common tasks undertaken by the team is writing letters to both internal and external customers. In all cases such letters need to conform to Adept Owl house styles. Currently letters are created from scratch. Mass mail-outs present a problem for efficiency as letters are created individually. This practice presents a problem with respect to consistency and wastage of resources. A standard procedure for completing a mass letter mail-out including a mail merge that is consistent with existing letter standards is required. In the interest of budgetary control, only existing organisational software should be required. The entire mail merge process should take no more than 5 minutes to perform.

Expense reporting

One type of document the organisation currently lacks standard processes for is expense reporting. Staff use a range of methods to report expenses. There are several problems associated with this arrangement. Staff complain about the time needed to input expenses. Administration staff complain about the lack of consistency, including incorrect or incomplete coding of expenses. Allowable expenses codes are:

- Food
- Transportation
- Communication
- Training
- Other



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A standard procedure for creating expense reports that encourages the use of time-saving macros is required. In the interest of budgetary control, only existing organisational software should be required. The entire procedure should take no more than 5 minutes to perform.

Future business needs and capability

At this point it is unclear whether the organisation's software list will be sufficient to take the organisation through the next five years. The advent of social media platforms (Web 2.0) and their use in both internal and external business communications/marketing and digital publishing technologies present both challenges and opportunities for Adept Owl. Unfortunately, current software capability within the administration team means that the team is barely proficient to use Microsoft Office and they will likely struggle with complex document tasks without further training or recruitment to bolster capability.



Appendix 2 – Test questions

Question 1

As a new member of the team you will need to identify organisational requirements. Referring to the Adept Owl scenario in Appendix 1, the Adept Owl style guide and procedures, identify:

- **One** requirement for information entry
- **Two** requirements for file naming and storage
- **Two** requirements for output or quality of document design and production
- **Two** compliance requirements – explain how the existing adept owl processes help ensure compliance with one piece of legislation and identify and explain one possible code of practice or standard relevant to document production for possible improvement of processes.

Question 2

Evaluate Adept Owl's present and future information technology capability to satisfy document design and production needs.

- With respect to human resource capability, where are the skills gaps that exist currently within the administration team?
- How could the skills gaps be closed in keeping with organisational practices?
- What future IT capability needs (both physical and human) could the organisation have with respect to document design and production within the next 2–5 years? Identify at least one source of external advice or information you have used to help you make this evaluation.
- What changes might be required to the Adept Owl style guide and procedures to take account of anticipated technological changes?

Question 3

Referring to the Adept Owl style guide and procedures, identify three types of documents used and required by the organisation.

Question 4

Develop a short procedure for either (a) a mass letter mail-out or (b) the creation of an expense report. Ensure your procedures:

- Follow general style requirements of the Adept Owl style guide; include at least two references to the style guide or procedures, for example, storage or use of fonts or headings
- Adhere to information, budget and technology requirements outlined in the scenario in Appendix 1.

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Assessment 2 – Portfolio of Activities

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 plagiarized 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 design and develop templates and develop standard text for documents in an organisational context.

Assessment description

In this assessment task, you will utilise the simulated business case study and scenario to design and develop templates and standard text for two types of business documentation in accordance with business requirements and style guidelines. You will submit templates to others for feedback, then you will improve and resubmit your final templates. You will also prepare a written reflection in which you will demonstrate knowledge of the document production process.

Procedure

1. Read the scenario in Appendix 1.
2. In response to the scenario and referring as required to the Adept Owl simulated business documentation provided, evaluate the purpose, audience and information requirements for a letter template and an expense report.
3. Develop a draft letter template, including standard text, that:
 - a. Meets scenario requirements including information and audience requirements for standard text, style and tone
 - b. Follows the Adept Owl style guide
 - c. Includes at least one suitable editing macro (remember, to save a macro in a template, you need to save as a macro-enabled template)
 - d. Includes fields for use with mail-merge.
4. Develop a draft expense report template (see example in Appendix 2) that:
 - a. Meets organisational requirements set out in the scenario
 - b. Includes at least one suitable macro to improve the usability of the expense report template
 - c. Includes one other feature such as drop-down lists or form fields to further automate or standardise document production.
5. Agree a timeframe for usability testing with your assessor (acting in the role of a senior manager)
6. Develop a testing schedule in accordance with agreed timeframe.
7. Conduct peer usability testing with fellow learners and collect written feedback on templates. Specifically request feedback on readability, appearance and usability.



- Submit draft templates to assessor, who, in the role of a senior manager will provide feedback for improving template design from the standpoint of the organisation.
8. Make improvements to the two templates to incorporate feedback.
 9. Print a hard copy of the final expense report according to organisational requirements.
 10. Write a reflection in which you describe the process you undertook to design and develop standard text for the letter template and expense report template. Ensure you include a description of how you:
 - a. Incorporated organisational and audience needs into your templates
 - b. Reviewed, evaluated and selected technology and complex technical functions for use in automating document production, matching document requirements with software functions
 - c. Reviewed and selected document designs and layout in accordance with organisational house style requirements
 - d. Efficiently planned and tested templates and gathered feedback on usability within agreed timeframe. Describe user feedback. Describe testing process: testing of macros; testing of mail merge.
 11. Submit documents to your assessor within an agreed timeframe. Ensure your documents reflect specifications as outlined below. Keep copies of all submitted materials for your records.



Specifications

You must provide:

- Draft and final templates for a letter and an expense report
- Testing schedule
- Copies of the written feedback on templates, for example mark-ups, emails, notes
- Written reflection on process of document production undertaken.

Your assessor will be looking for templates and a written reflection that demonstrate:

- Literacy skills to:
 - Read and interpret policies and procedures
 - Review and select technological designs
 - Consider aspects of context, purpose and audience when designing and formatting texts
- Technological skills to manage design requirements and layouts
- Knowledge of document production processes
- Knowledge of the functions of a range of software applications, including desktop publishing (formatting), word processing and spreadsheets
- Knowledge of organisational policies and procedures relating to document design and formatting.

Appendix 1 – Adept Owl scenario

Design and develop standard text

As a new member of the administration team, with a responsibility for team leadership and document design and development, you will need to lead and manage template development.

One of the most common tasks undertaken by the administration team is writing letters to both internal and external customers. To conform to business requirements, such letters need to adhere to Adept Owl house styles and use Microsoft Word. The team and organisation require easy-to-use templates to facilitate letter writing and editing for a range of purposes and associated information content, for example marketing mail-outs and internal communication. Macros may be useful for a range of editing functions:

- Replacing multiple spaces with a single space
- Replacing soft returns with paragraph breaks
- Removing spaces that occur directly before or after paragraph breaks
- Removing spaces that occur directly before or after tabs
- Replacing multiple tabs with a single tab.

Currently, letters are created from scratch. Mass mail-outs present a problem for efficiency as letters are created individually. This practice presents a problem with respect to consistency and wastage of resources.

In particular, a letter template for production delays is sorely needed to standardise the organisation's communications with affected customers. See Appendix 1 for content requirements and audience needs.

Another type of document the organisation currently lacks standard templates or processes for is expense reporting. Staff use a range of methods to report expenses. There are several problems associated with this arrangement. Staff filling out reports complain about the time needed to input expenses. Administration staff complain about the lack of consistency, including incorrect or incomplete coding of expenses.

There are several business needs associated with expense reporting. For example, allowable expenses codes are:

- Food
- Transportation
- Communication
- Training
- Other.

See Appendix 2 for details on information and formatting needs for both the letter and spreadsheet templates.

Finally, according to recent staff feedback, an expense report template that takes advantage of time-saving macros is required. For example, macros could save time by clearing fields or calculating totals.



Appendix 2 – Information and formatting requirements

Production delay letter template

Content:

- Opening paragraph: thanking the customer for their purchase and informing there is a delay
- Body content: apologising for delay; stating the reasons for the delay, and expected date of delivery
- Closing paragraph apology for inconvenience and an invitation for contact if required.

Style:

- Professional
- Formal language

Tone:

- Friendly
- Apologetic



Expense reporting spreadsheet template

Presentation:

- Spreadsheet must be able to be printed on a single A4 page; landscape or portrait.

Dates:

- Data entry must be constrained to: date format only.
- Data entry must be formatted to: short date form.

Department:

- Must be chosen from list: *Sales & Marketing, Administration, Executive, Operations, Dispatch, Logistics.*

Expense types:

- Must be chosen from list: *Food; Transportation; Communication; Training; Other.*

Item description:

- Data entry must be constrained to: *text only.*
- Data entry must be formatted to: *italics.*

Client ID number:

- Must be chosen from list: *NA, AO-2006-0046, AO-2006-0050, AO-2008-0049, AO-2009-0047, AO-2009-0051, AO-2009-0052, AO-2009-0053, AO-2010-0045, AO-2010-0054.*

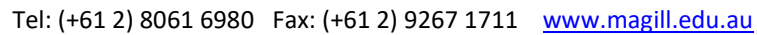
Purchase or estimated amount, value or cost:

- Data entry must be formatted to: *accounting.*

Receipt attached?

- Must be chosen from list: *Yes, No.*

Example spreadsheet:



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Assessment 3 – Written Report

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 plagiarized 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 and implement strategies for the use of standard documentation and for continuous improvement of standard documentation within an organisational context.

Assessment description

In response to a simulated business case study and a scenario, and following on from Assessment Task 2, you will plan and deliver a short training session to introduce staff to new templates. You will monitor both the success of the training and the performance of the administration team and present findings in a written evaluation report.

Procedure

Part A

1. Read the scenario in Appendix 1.
2. Examine team performance and capability (set out in Appendix 1).
3. Consult with your assessor to determine which staff member (Pat, Sam or Kim) you will plan training for.
4. Plan a short training session (for your assigned staff member) on the use of the letter template that you developed in Assessment Task 2:
 - a. Develop explanatory notes for the template for use by staff as job aids and for use in the session delivery, on:
 - i. Applying the style guide when using templates and macros
 - ii. Considering aspects of context, purpose and audience when designing and formatting texts
 - iii. Naming the document and storage requirements.
 - b. Develop a session plan for a 10 to 20-minute session, which includes planning for:
 - i. Introducing and explaining the template and how it conforms with organisational requirements
 - ii. Demonstrating functions (those that need to be demonstrated considering the staff member's current skills)
 - iii. Allowing practice and questions and providing feedback on performance



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- iv. Recording whether the staff member can use the template at the level of 'practitioner' (see level description in the legend of appendix 1). Note: you will need to plan to monitor whether staff can demonstrate use, naming and storage in accordance with organisational requirements.
5. Arrange with your assessor to demonstrate or role-play training.
6. Deliver the training. Ensure you:
 - a. Use communication skills to explain features. Ensure you ask questions to confirm trainees' understanding. Ensure you listen to trainees' questions and respond appropriately
 - b. Draw attention to the importance of applying the style guide in using the templates
 - c. Follow your session plan to introduce, demonstrate, allow the trainee opportunity to practise, provide feedback and then assess the trainee
 - d. Record whether the staff member can use the template.

Part B

1. Develop an evaluation report on the state of document design and production at Adept Owl. Your report should contain:
 - a. Information on performance, current skills (outlined in Appendix 1) and observed assessment in the role-played training session; ensure you compare standards for document production, including performance targets, with actual skills and performance to identify gaps
 - b. At least three recommendations for continuous improvement and closing performance and skills gaps based on your monitoring of actual performance (the training undertaken in Part A), performance and skills information provided in Appendix 1, and research undertaken; ensure you:
 - i. Include technical needs to close gaps and improve operations with respect to template use
 - ii. Include training needs with respect to technical functions
 - iii. Include changes to policies, procedures or style guides to support implementation of recommendations
 - iv. Refer to the advice of experts or relevant sources of expert advice to support recommendations, for example a business communications expert you have access to or information from print or online business literature
 - v. Include a summary plan of all activities to implement recommended changes over the financial year, including description of activity,



resources needed (including costs where relevant), person responsible and timeframe. Use template in Appendix 2 or similar.

2. Submit your explanatory notes, session plan and evaluation report to your assessor within an agreed timeframe and in an agreed format. Ensure your submitted documents reflect specifications as outlined below. Keep copies of all submitted materials for your records.

Specifications

You must submit:

- Presentation materials used for the training session delivered
- Explanatory notes
- Session plan
- Evaluation report, including implementation plan.

Your assessor will be looking for delivery of training, supporting documents and an evaluation report that, taken together, demonstrate:

- Communication skills to present complex instructions verbally, to communicate ideas logically, and to explain technical concepts and designs to others
- Literacy skills to:
 - Read and interpret policies and procedures
 - Consider aspects of context, purpose and audience when designing and formatting texts
- Research and analysis skills to evaluate content, structure and purpose of technical texts, and to adapt task instructions to suit changes in technology
- Knowledge of document production processes
- Knowledge of the functions of a range of software applications, including desktop publishing, word processing and spreadsheets
- Knowledge of organisational policies and procedures relating to document design and formatting
- Knowledge of sources of expertise external to the organisation or workgroup.



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Appendix 1 – Adept Owl scenario

Adept Owl scenario: Implement strategies for use and continuous improvement of documentation processes

You are the team leader of the Adept Owl administration team with responsibility for leading document design and production.

According to the Adept Owl vision statement, the company intends to establish its reputation within five years, 'as one of the finest, most innovative and entertaining board game developers in Australia'.

To help achieve this goal within your area, you will need to develop people-focused implementation strategies, for example delivering training on documentation, to ensure the cooperation of all staff in the maintenance of document quality, sustainability, and legal and ethical compliance.

In order to contribute to continuous improvement by developing training and reporting on performance, you will need to consider current performance and administration team capability.



Appendix 2 – Test questions

To implement strategies for improving capability and monitoring and reviewing performance for the purpose of continuous improvement, you will need to consider the current skills and performance of the team.

Administration team capability

The administration team has identified six key skills that each team member will need to perform at a practitioner level (see the legend for clarification of levels) or above:

Team member and current capability

Work task	You (team leader)	Pat	Sam	Kim
Creating and using templates in Word and Excel.				
Creating and using macros in Word and Excel.				
Creating and using mail merge features in Word.				
Creating and using form fields in Word.				
Creating and using drop down lists in Excel.				
Creating and using formulae in Excel.				

Legend:

	Untrained – Team member has no training.
	Learner – Team member cannot perform task independently.
	Practitioner – Team member can perform task independently with supervision.
	Operator – Team member can perform task independently.
	Coach – Team member can train others to perform task.

Administration team performance (Quarter 1)

The administration team at Adept Owl performs a range of documentation tasks. These tasks are grouped into several main areas of activity, which provide the basis for measuring performance that drives organisational outcomes.

The administration team scorecard below shows performance metrics, targets and outcomes for the first quarter of the financial year.

Performance area	Performance metric (KPI)	Target	Outcomes
Customer focus	Per cent of documents conforming to style guide	100%	80%



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Productivity	Average time (per mail-out) to edit the letter being sent	30 minutes	60 minutes
	Average time per mail merge	5 minutes	10 minutes
	Data entry error rate	3%	10%
Employee development	Number of training hours per employee	20 hrs per employee per quarter	5 hours in first quarter
Expense	Average cost per mail-out (excluding postage)	\$100	\$165
	Average labour cost per page of edited text	\$50	\$68
Sustainability	Average sheets of paper used per letter	3 sheets	10
	Average toner use per quarter	10 cartridges	15 cartridges
Compliance	Identified breaches of legislation, including WHS/OHS, anti-discrimination, privacy	0 incidents	0 incidents
	Privacy related complaints	0 incidents	1 incident



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Appendix 3 – Implementation/action plan template

Action/task	Resources/cost	Responsible person/role	Timeframe