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**Implement Operational Plan**

Unit of Competency – BSBMGT402

Performance Evidence

**Workplace Assessment 1 of 1**

**Operational Plan**

**In the Workplace:**

To complete this assessment you will need to speak with your Manager to confirm a topic for your Operational Plan. This topic should be beneficial to your team and also align to the overall Strategic Plan of the organization.

**There are 3 Parts to this assessment**.

Part 1 is to be completed after finishing Topic 1 “Implement Operational Plan” Part 2 is to be completed after finishing Topic 2 “Implement Resource Acquisition”.

Part 3 is to be completed after finishing Topic 3 “Monitor Operational Performance”.

**Part 1 – Implement Operational Plan**

**ASSESSMENT INSTRUCTIONS**

You should have now read the content and completed the short answer questions for the first topic  *‘Implement Operational Plan’.*

At this point, please go ahead and develop your Operational Plan on pages 3 – 11 of this workbook. *Please note you are not required to move to Part 2 until you have completed Topic 2 (Implement Resource Acquisition) of this Unit.*

**Implement Operational Plan**

It is now time to develop an operational plan for your team/department.

**Step 1 –** You must first understand your team’s capabilities and the key stakeholders’ priorities.

|  |  |
| --- | --- |
| **Step 1 - Gathering Information – SWOT Analysis & Stakeholders** | |
| **Strengths** | **Weaknesses** |
| **Opportunities** | **Threats** |
| **Who are the Stakeholders ?** |  |
| **How will you get their input?** |  |

**Implement Operational Plan**

It is now time to develop an operational plan for your team/department.

**Step 2 –** Based on your strengths and weaknesses and your predictions of the future what is a project, idea or initiative that you’d like to put a plan around? Discuss this with your manager and agree on a topic to implement below.

|  |  |
| --- | --- |
| **Step 2 - Objective** | |
| **Plan Name:** |  |
| **Objective**  Ensure it is one sentence, follows the SMART principle and is in line with the organisational strategy |  |

**Implement Operational Plan**

**Step 3 –** It’s time to put together the basic operational plan detailing who will do what.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Step 3 – Operational Plan** | | | | |
| **ID** | **What** | **Who** | **When** | **How Much** |
| **1.** |  |  |  |  |
| **2.** |  |  |  |  |
| **3.** |  |  |  |  |
| **4.** |  |  |  |  |
| **5.** |  |  |  |  |
| 6. |  |  |  |  |

**Implement Operational Plan**

**Step 4 –** It is important to document how each task will be completed. This will ensure clarity but also provide a good contingency planning document.

|  |  |
| --- | --- |
| **Step 4 – Procedures** | |
| **ID** | **Procedure** |
| **1.** |  |
| **2.** |  |
| **3.** |  |
| **4.** |  |
| **5.** |  |
| 6. |  |

**Implement Operational Plan**

**Step 5 –** Now that you have the what and the how in place, you need to determine some measures to help you along the way.

|  |  |
| --- | --- |
| **Step 5 – Measurements** | |
| **KPIs**  How will you know if your plan is on track? Consider measurements of performance such as % increase/decrease. Show 2 Lead and 2 Lag measures. | **1. (Lead)**  **2. (Lead)**  **3. (Lag)**  **4. (Lag)** |
| **Step 6 – Resources** | |
| **Financial**  (Do you need a budget?) |  |
| **Human**  (Are staff required?) |  |
| **Physical**  (What new items are required?) |  |

**Activity**

**Implement Operational Plan**

|  |  |  |
| --- | --- | --- |
| **Step 7 – Contingency Planning** | | |
| **What are the potential risks?** | | **How can manage these risks or alter the Operational Plan, if they do occur?** |
|  | |  |
| **Step 8 – Evaluation** | | |
| **How will you evaluate the success of the plan?** |  | |

*Before progressing to Part 2 - Please return online and continue with Topic 2 – Implement Resource Acquisition*

**Part 2 – Implement Resource Acquisition**

**ASSESSMENT INSTRUCTIONS**

You should have now read the content and completed the short answer questions for the second topic *‘Implement Resource Acquisition’*.

Now that your Operational Plan is prepared you will be required to gather physical and human resources (as per Step 6 of your Operational Plan). In accordance with your organisations systems and procedures please go ahead and recruit staff (may be internal or external) to assist with implementing your Operational Plan. Please also prepare an induction plan for these staff with the template below, and then go ahead and complete the induction with them.

**Induction Plan**

**Create an induction plan for a new staff member in your team (that will assist with this Operational Plan) in their first two weeks.**

**Staff Name:**

**Position Title:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Day** | **Activity** | **Time/Location** | **Contact** | **Other Info** |
|  |  |  |  |  |
|  |  |  |  |  |
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|  |  |  |  |  |

You will also require physical resources (such as office equipment) to assist you in conducting your Operational Plan. Please complete the table based on our example.

|  |  |  |
| --- | --- | --- |
| **Resource Requirements** | **Existing** | **Required** |
| *4x Full Time Employees* | *4x Full Time Employees* | *Nil* |
| *8x Casuals on call for peak periods* | *6x Casuals* | *2x New Casuals* |
| *8x functioning workstations* | *8x desks, but only 6 Computer Monitors* | *2x Computers Monitors* |
| *Access to 1x work car 24hrs per day* | *Access to 1x work car 24hrs per day* | *Nil* |
|  |  |  |

|  |  |  |
| --- | --- | --- |
| **Resource Requirements** | **Existing** | **Required** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  | *Insert as required* |

**In The Workplace**

Having now identified what additional resources are required, go ahead and develop a Resource Acquisition Plan for 1 item you will require. Choose a physical resource such as a new Computer Monitor. Consider your internal policies and processes and follow the correct channels. You may complete and submit your organisations Resource Acquisition form (if they have one).

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Resource Acquisition Plan** | | | | |
|  | |  | | |
| **What is required:** | |  | | |
| **When is it required:** | |  | | |
| **Who needs to approve:** | |  | | |
| **Why is this resource required:** | | | | |
|  | | | | |
| **Who will be impacted by this:** | | | | |
| **Stakeholder** | | | **Impact** | |
|  | | |  | |
|  | | |  | |
|  | | |  | |
|  | | |  | |
|  | |  | | |
|  | | | | |
|  | |  | | |
| **Recommendations:** | |  | | |
|  | **Option A** | | **Option B** | **Option C** |
| **Supplier:** | *e.g. Proteus Tech* | |  |  |
| **Cost:** | *$120* | |  |  |
| **Payment Terms:** | *7 Days* | |  |  |
| **Delivery Date:** | *3 Days* | |  |  |
| **Comments:** | *Example only – insert your own suppliers* | |  |  |
|  | | | | |
|  | |  | | |
| **Approved / Declined:**  **(circle approved option)** | |  | | |
|  | |  | | |

**Part 3 – Monitor Operational Performance**

**ASSESSMENT INSTRUCTIONS**

You should have now read the content and completed the short answer questions for the third topic *‘Monitor Operational Performance*’.

Please now go ahead to page 15 of this workbook and complete the Managing Performance template. This will give you a guide as when you will need to encourage and discipline your staff members as they implement the Operational Plan and are measured against the plans KPI’s.

Once you have completed the Managing Performance template it is time to implement your operational plan. You will need to monitor the results against the KPI’s that you have set and against budget . Also monitor the performance of the team and provide mentoring and coaching in the use of required resources for this operational plan.

Once the Operational Plan is underway you are now required to prepare a presentation (pages 16, 17 & 18) based on the results of the Operational Plan so far and any variations that you are recommending. This should be presented to your Line Manager. After the presentation please meet with your Line Manager to discuss the outcomes of the Operational Plan and gain sign off for this Unit.

Please note, if you are unable to meet with your manager there are 3 other options available for sign off:

1. Attend a Proteus Implementation Day to be assessed by a Proteus Coach (ph: 1300 219 903 for further information).
2. Arrange an appointment at a Proteus office to be assessed by a Proteus Coach (ph: 1300 219 903)
3. Send a Video of your presentation to be assessed by your Course Coach to [online@proteusleadership.com](mailto:online@proteusleadership.com).

**Managing Performance**

Great Leaders are able to provide clear instructions for the tasks. They also provide encouragement when the job is done well and they know when to have the tough conversations. Can you please complete the below table and identify points throughout the implementation of the Operational Plan, when you will need to encourage and discipline your team, based on KPI measurements.

|  |  |  |  |
| --- | --- | --- | --- |
| **Instruct, Discipline and Encourage for Performance** | | | |
| **KPI** | **Instruct** | **Discipline** | **Encourage** |
| **1.** |  |  |  |
| **2.** |  |  |  |
| **3.** |  |  |  |
| **4.** |  |  |  |

**Implement Operational Plan**

**Presentation**

It is now time to construct a full presentation on how your Operational Plan is tracking and any recommendations for variation. You will then present to your Line Manager and colleagues. Prior to commencing preparation, complete the checklist below. This will help to make your presentation more relevant and ensure better outcomes.

Presentation Checklist

|  |  |
| --- | --- |
| **Checklist** | **Actions** |
| **Who is your audience?** |  |
| **What are some of the key characteristics of your audience?** (eg. Age, cultural, educational, gender, language, physical ability and experience with the topic). |  |
| **What visual aids and materials will you use in your presentation?** |  |
| **What examples will you use to illustrate your key points?** |  |
| **What persuasive communication techniques will you use?** |  |
| **How will you build rapport and make your presentation fun and interactive?** |  |
| **How will you give participants opportunities to seek clarification of central concepts during or after the presentation?** |  |

**Operational Plan Presentation**

**INTRODUCTION**

Hello, my name is…

I am here today to talk about (topic)…

**SELF**

My background is…

Before we start, I would like to ask…

**OTHERS**

Today I would like to talk about…

**SCENE (4 dot points)**

\*

\*

\*

\*

My OBJECTIVE today is…

As a RESULT of this you will be able to…

THE BODY

Point 1

\*

\*

\*

Point 2

\*

\*

\*

Point 3

\*

\*

\*

Point 4

\*

\*

\*

In CONCLUSION today we have covered…

**Scene:**

\*

\*

\*

\*

As a RESULT you will be able to…

*Please now meet with your Manager to discuss the results of the Operational Plan and the presentation – also to gain sign off for this Unit.*

**Manager’s Sign Off**

|  |  |  |
| --- | --- | --- |
| **Implement Operational Plan – Workplace Assessment 1** | **Yes** | **No** |
| Did the student interact with a range of stakeholders to gather information to create their Operational Plan? |  |  |
| Has the student shown the ability to vary the plan and gain approval to deal with contingencies? |  |  |
| Was the student able to monitor operational performance and take action to rectify any unsatisfactory performance? |  |  |
| Did the student implement the Resource Acquisition Plan (or your organisations equivalent) as outlined in this assessment? |  |  |
| Has the student been involved in the recruitment and induction process of an employee in line with the organisations policies? |  |  |
| Did the staff member provide mentoring and coaching to staff members that on the implementation of aspects of the operational plan? |  |  |
| Has the student implemented and monitored the Operational Plan against KPIs and budgets as outlined in this assessment? |  |  |
| Are the Contingency Plans developed in this assessment satisfactory and realistic for the organisations expectations? |  |  |
| Did the student present recommendations for the implementation and variation of the operational plan? |  |  |
| Has the student documented and provided reports on the performance of the operational plan, as required by the organisation? |  |  |
| **Feedback – Skills Performance** |  |  |
| What feedback can you give you the staff member regarding the standard of their performance in these skills listed above? (50-100 words). Please consider areas of success and areas of development. | | |
| **Your Feedback:** | | |

**Your Name:**

**Your Job Title:**

**Your Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Date:**

**ASSESSMENT INSTRUCTIONS**

This is the end of Workplace Assessment 1.

Please now go online to the topic menu page for ‘Unit 8 - Implement Operational Plan’ and click on the box **‘Workplace Assessment’** to submit Workplace Assessment 1.

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**Grading and Feedback.**

Feedback will be provided for each question through the Online Learning System. You will receive an email notification of feedback being posted.

If there are any required changes you will be given an opportunity to resubmit.

Proteus Leadership – 1300 219 903 – [online@proteusleadership.com](mailto:online@proteusleadership.com)

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