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**Unit 6: Manage Operational Plan**

Unit of Competency – BSBMGT517

Performance Evidence

**Workplace Assessment**

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

Part 1 is to be completed after finishing Topic 1 “Develop operational plan

Part 2 is to be completed after finishing Topic 2 “Plan and manage resource acquisition”,

Part 3 is to be completed after finishing Topic 3 “Monitor and review operational performance”.

**Part 1 – Operational Plan**

**ASSESSMENT INSTRUCTIONS**

You should have now read the content and completed the short answer questions for the first topic *‘*Develop operational plan’*.*

In this Part, you will need to create an operation plan by completing steps 1-8.

You can either use: 1) A workplace operation or idea or 2) the MAMILs scenario provided below.

***Scenario***

The business idea is as follows;

* You want to start up a tour business that caters for MAMILs
* The idea is that, for a fee, you will arrange cycling tours in desirable (bucket list) locations, e.g.
  + Tour of Tasmania in warmer months
  + In the more temperate months offer tours of wine regions such as Barossa and Clair Valleys in SA, or Margaret River Region in WA or Hunter Valley and surrounds in NSW
  + Tropical tours in the colder months e.g. the Daintree and Port Douglas region, etc.
* The tours will accommodate approx 20-30 cyclists at a time and will be fully supported by your team of tour coordinators and tour support teams.
* You will market to MAMILs in your own capital city
* You will equip a 6 Meter shipping container to safely and securely transport their bicycles and equipment to the starting point for each tour and return everything to a central point back in their capital city at the end of the tour.
* It is the responsibility of each MAMIL to drop off and pick up their gear at the central point in your capital city.
* The duration of the tours will range from 7-14 days
* Preliminary research on your part indicates that MAMILs would be prepared to pay in the range of $3-5K each for a tour.
* The model that your tours will follow is;
  + The MAMILs pay their own travel costs to get to the start point of the tour and their return home at the completion of the tour.
  + Your tour team will provide a support vehicle to travel with the herd each day of the tour.
  + The tours will range from budget tours where the herd will stay overnight in camping and caravan parks along the way, through to more up-market tours where they will stay in hotel and or B&B style accommodation.
  + For the budget tours you propose that your support vehicle provides a BBQ breakfast and evening meal at the camps.

The way you want to set up this new business is to develop a single but successful operation that services MAMILs in your Capital City. When you have the model running successfully you plan to franchise operations nationally and potentially internationally. Your goal is that in five years’ time you will be managing a group of franchises and have both a good income as well as a good work/life balance.

|  |  |
| --- | --- |
| **Step 1 - Gathering Information – SWOT Analysis & Stakeholders** | |
| **Strengths** | **Weaknesses** |
| **Opportunities** | **Threats** |
| **Who are the Stakeholders?** | **How will you get their input?** |
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| **Step 2 - Objective** | |
| **Plan Name:** |  |
| **Objective**  Ensure this is one sentence, follows the SMART principle and is in line with the organisational strategy |  |

It’s time to put together the operational plan detailing who will do ‘**what’**.

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

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

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| **Step 4 – Procedures** | |
| **ID** | **How?** |
| **1.** |  |
| **2.** |  |
| **3.** |  |
| **4.** |  |
| **5.** |  |
| **6.** |  |

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

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| **Step 5 – Measurements** | |
| **KPIs**  How will you know if your plan is on track? Consider measurements of performance such as % increase/decrease. | **1.**  **2.**  **3.**  **4.** |

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| **Step 6 – Resources** | |
| **Financial**  (Do you need a budget?) |  |
| **Human**  (What staff are required?) |  |
| **Physical**  (what items are required?) |  |

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

*Please return online and continue with Topic 2 –* Plan and manage resource acquisition*.*

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**Part 2 – Resource Acquisition Plan**

**ASSESSMENT INSTRUCTIONS**

You should have now read the content and completed the short answer questions for the second topic *‘*Plan and manage 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 this Part, you are required to complete Step 1 and 2.

**Step 1 - Induction 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.

Staff Name:

Position Title:

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| --- | --- | --- | --- | --- |
| **Day** | **Activity** | **Time/Location** | **Contact** | **Other Info** |
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**Step 2 - Resource Acquisition Plan**

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).

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| --- | --- | --- | --- | --- |
| **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** | |
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|  | | |  | |
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|  | |  | | |
| **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)** | |  | | |
|  | |  | | |

*Please return online and continue with Topic 3 –* Monitor and review operational performance*.*

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**Part 3 – Monitor & Reviewing Operational Performance**

**ASSESSMENT INSTRUCTIONS**

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

In this Part, you are required to complete steps 1 - 3.

**Step 1 – Conduct**

Carry out your operational plan. This plan could take week and even months.

**Step 2 – Monitor and Review**

Conduct a full review of your operation plan once it is complete.

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| --- | --- |
| Review Item | Comments |
| Objective  (Did you meet your objective |  |
| Variations on Plan  (Were there any variations to the plan?) |  |
| Variations on Procedures  (Were there any variations to the procedure?) |  |
| Resource Acquisition  (Did you have any issues with recourse acquisition?) | 1. Financial 2. Human 3. Physical |
| KPI’s  (Did you meet the KPI’s?) | 1.  2.  3.  4. |
| Team Performance  (Were there any performance issues that required counselling or disciplinary action?) |  |
| Risk  (Were there any new risks previously not considered?) |  |
| Record Keeping  (What records were kept?) |  |
| Intellectual Property  (Is there any intellectual property that needs to be protected? If so, how will you do this?) |  |

**Step 3 - Manager’s Sign Off**

Once you have completed all the above meet with your manager to gain feedback and get sign off for this Unit. *Please note, your manager must provide written feedback in the space below*

If you are unable to meet with your manager there are 2 other options available for sign off:

1. Attend a Proteus Implementation Day
2. Arrange an appointment with your Proteus Coach

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| --- | --- | --- |
| **Manage Operational Plan – Workplace Assessment** | **Yes** | **No** |
| Did the student develop and implement an operational plan using a variety of information sources and consultation (including using specialist advice if required) which includes:   * resource requirements * key performance indicators * monitoring processes * contingency plans ? |  |  |
| Did the student communicate effectively with relevant stakeholders to explain the plan and supporting information, seek approvals, negotiate variations and engage work teams? |  |  |
| Did the student develop and implement strategies to achieve the operational plan within the organisation’s policies, practices and procedures including:   * recruiting, inducting and developing personnel * acquiring physical resources and services * protecting intellectual property * making variations to the plan * monitoring and documenting performance? |  |  |
| **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. | | |

**Managers Name:**

**Managers Job Title:**

**Managers Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Date:**

**ASSESSMENT INSTRUCTIONS**

This is the end of the Workplace Assessment.

Please now go online to the topic menu for ‘Unit 6 – Manage Operational Plan’ and click on the box **‘Workplace Assessment’** to submit your Workplace Assessment.

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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.

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