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Business Works is a series of training and assessment resources developed for qualifications within the Business Services Training Package.

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| A close up of a logo  Description automatically generated | **Introduction** |
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The assessment tasks for *BSBOPS502 Manage business operational plans* are outlined in the assessment plan below. These tasks have been designed to help you demonstrate the skills and knowledge that you have learnt during your course.

Please ensure that you read the instructions provided with these tasks carefully. You should also follow the advice provided in the *Business Works Student User Guide*. The Student User Guide provides important information for you relating to completing assessment successfully.

**Assessment for this unit**

*BSBOPS502 Manage business operational plans* describes the performance outcomes, skills and knowledge required to manage business operational plans for products, programs, processes or services to an operational level.

For you to be assessed as competent, you must successfully complete two assessment tasks:

* Assessment Task 1: Knowledge questions – You must answer all questions correctly.
* Assessment Task 2: Project – You must work through a range of activities and complete a project portfolio.

| A close up of a logo  Description automatically generated | **Assessment Task 1: Knowledge questions** |
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**Information for students**

Knowledge questions are designed to help you demonstrate the knowledge which you have acquired during the learning phase of this unit. Ensure that you:

* review the advice to students regarding answering knowledge questions in the *Business Works Student User Guide*
* comply with the due date for assessment which your assessor will provide
* adhere with your RTO’s submission guidelines
* answer all questions completely and correctly
* submit work which is original and, where necessary, properly referenced
* submit a completed cover sheet with your work
* avoid sharing your answers with other students.

|  | **Assessment information**  Information about how you should complete this assessment can be found in Appendix A of the *Business Works Student User Guide*.Refer to the appendix for information on:   * where this task should be completed * the maximum time allowed for completing this assessment task * whether or not this task is open-book.   *Note*: You must complete and submit an assessment cover sheet with your work. A template is provided in Appendix C of the Student User Guide. However, if your RTO has provided you with an assessment cover sheet, please ensure that you use that. |
| --- | --- |

**Questions**

Provide answers to all of the questions below:

1. Explain:

* the purpose and content of an operational plan
* the role of an operational plan in achieving the organisation’s objectives
* the purpose and content of a contingency plan.

1. Explain the difference between an operational plan modelled on the organisation as a whole and one that has been modelled to suit a specific organisational goal or department.
2. Describe typical methods for developing an Operational Plan.
3. Complete the table below to describe information sources necessary to develop and present operational plans.

| **Information source** | **Description** | **Example** |
| --- | --- | --- |
| Colleagues/employees |  |  |
| External consultants |  |  |
| Specialist resource managers |  |  |
| Strategic plan |  |  |
| Budgets and forecasts |  |  |
| Legislation and regulatory authorities |  |  |
| Organisational policies and procedures |  |  |

1. Outline the roles and responsibilities of the following key stakeholders involved in the development of an operations plan.

| Stakeholder | Roles and responsibilities |
| --- | --- |
| Colleagues/employees |  |
| Supervisors/team leaders |  |
| Specialist resource managers |  |

1. Answer the following questions about escalation points.

| Explain what is meant by ‘escalation points’. |  |
| --- | --- |
| Identify the common levels of escalation. |  |
| List three criteria for escalation. |  |

1. List four ways to consult with stakeholders:
2. Complete the table below to describe the requirements for resources included in operational plans:

| **Resource Type** | **Description of the resources and 2 examples:** | **How to acquire the resource:** |
| --- | --- | --- |
| Physical |  | How do you acquire physical resources and/or services? |
| What does a procurement process include (list at least four considerations)? |
| Relevant organisational policies and procedures (at least one): |
| Financial |  | What workplace documents provides information about financial resources? (describe at least one): |
| How does the budgeted and actual finances influence profitability and productivity of the operational plan? |
| Explain how to obtain additional finances: |
| Human |  | How do you recruit staff? |
| List at least two induction strategies: |
| Relevant organisational policies and procedures (at least one): |

1. Explain the purpose of key performance indicators.
2. List four different approaches to developing key performance indicators.
3. Explain the procedure for documenting performance, including records that should be kept.
4. When developing and putting in place operational plans, it’s important to adhere to legislative and regulatory frameworks. Explain how the following impact the way which businesses operate.

| Fair trading |  |
| --- | --- |
| Work health and safety |  |

**Assessment Task 1: Checklist**

| Student’s name: | | | | |
| --- | --- | --- | --- | --- |
| Did the student provide a sufficient and clear answer that addresses the suggested answer for the following? | Completed successfully? | | Comments | |
| Yes | No |  | |
| Question 1 |  |  |  | |
| Question 2 |  |  |  | |
| Question 3 |  |  |  | |
| Question 4 |  |  |  | |
| Question 5 |  |  |  | |
| Question 6 |  |  |  | |
| Question 7 |  |  |  | |
| Question 8 |  |  |  | |
| Question 9 |  |  |  | |
| Question 10 |  |  |  | |
| Question 11 |  |  |  | |
| Question 12 |  |  |  | |
| Task outcome: | * Satisfactory | | | * Not satisfactory |
| Assessor signature: |  | | | |
| Assessor name: |  | | | |
| Date: |  | | | |

| A close up of a logo  Description automatically generated | **Assessment Task 2: Project** |
| --- | --- |

**Information for students**

In this task, you are required to demonstrate your skills and knowledge by working through a number of activities and completing and submitting a project portfolio.

You will need access to:

* a suitable place to complete activities that replicates a business environment including a meeting space and computer and internet access
* your learning resources and other information for reference
* *Project Portfolio* template
* *Simulation Pack* (if you need a case study).

Ensure that you:

* review the advice to students regarding responding to written tasks in the *Business Works Student User Guide*
* comply with the due date for assessment which your assessor will provide
* adhere with your RTO’s submission guidelines
* answer all questions completely and correctly
* submit work which is original and, where necessary, properly referenced
* submit a completed cover sheet with your work
* avoid sharing your answers with other students.

|  | **Assessment information** |
| --- | --- |
| Information about how you should complete this assessment can be found in Appendix A of the *Business Works Student User Guide*.Refer to the appendix for information on:   * where this task should be completed * how your assessment should be submitted.   *Note*: You must complete and submit an assessment cover sheet with your work. A template is provided in Appendix B of the Student User Guide. However, if your RTO has provided you with an assessment cover sheet, please ensure that you use that. |

**Activities**

Complete the following activities:

1. Carefully read the following:

| Atom | This project requires you to develop and manage an operational plan for one business or work area by:   * sourcing information relevant to your work area/business and its related operational plan. * consulting with others to develop and approve an operational and contingency plan. * managing resource acquisition and performance according to organisational policies and procedures. * addressing underperformance. * negotiating and approving variations to the operational plan. |
| --- | --- |
|  | Vocational education and training is all about gaining and developing practical skills that are industry relevant and that can help you to succeed in your chosen career. For this reason, we are giving you the choice to base this project on your own business, one you work in or a familiar with, or you can use the case study provided. This will mean that you are applying your knowledge and skills in a relevant, practical and meaningful way to your own situation! |
|  | It is important that you are able to access enough information for your chosen business in order to be able to do your assessment. As a minimum this should include organisational policies and procedures related to operational plans. You will also need data to review and assess operational progress in step 5. |
|  | Relevant policies and procedures may include:   * Recruitment, Induction and Development * Procurement and Suppliers * Reporting and Documenting * Hierarchy of control/ Approval * Any other relevant policies and procedures. |
|  | You will need to communicate with people who work for, or are involved, in this business or work area several times. Your communication may be either directly with actual staff members or fellow students/your assessor can play the roles of relevant people/parties. Communication can be in any appropriate format (e.g. face to face, video conference, email) as long as it meets the requirements outlined in the Project Portfolio.  You will be collecting evidence for this unit in a Project Portfolio. The steps you need to take are outlined below. |

1. Preparation

| Person eating | Make sure you are familiar with the organisation you are basing this assessment on and have read through the necessary background information. For the case study business, this is all of the documents included in the Simulation Pack.  If it’s your own business or a business where you are working or are familiar with, have your business approved by your assessor and identify a work area to develop an operational plan for.  If you are using the case study, you will assume the role of sales manager and develop an operational plan for the approved business model “develop a cloud-based solution”.  Complete *Page 4* of your *Project Portfolio* for this unit.  Read through the requirements of *Section 1, 2 and 3* of your *Project Portfolio*. |
| --- | --- |

1. Planning for an operational plan

| Person eating | Complete Section 1 of your Project Portfolio.  To complete Section 1, you need to:   * source information relevant to the development of an operational plan for your work area, including stakeholders, legislative, organisational, financial and intellectual property requirements. |
| --- | --- |
|  | * identify potential activities and resource requirements (including their financial implications and KPIs) for the operational plan (include at least one human resource and one physical resource). * identify data security issues. |
| Document | Make sure you have answered all questions in Section 1. Submit to your assessor for review.  You are also required to attach certain documents as part of your evidence – review the documents you need to attach as outlined in *Section 1* of the *Project Portfolio* and make sure you attach these upon submission.  You will use the work done in this section of the Portfolio to consult with others and lead teamwork to develop an operational plan in the next activity. In preparation, read through step 4. |

1. Developing an operational plan

| Chat | Meet with at least two of the stakeholders you identified as part of *Section 1* of your *Project Portfolio*. One of the stakeholders must be a client.  Consult with stakeholders to agree on activities, resources, timeframes, KPIs and monitoring processes. |
| --- | --- |
|  | This meeting should take 20 minutes.  This meeting may take place with actual people who work for/are associated with your chosen business. Alternatively, classmates or your assessor may play the role of one or more team members.  This can either be viewed in person by your assessor or you may like to video record the session for your assessor to watch later. Your assessor can provide you with more details at this step. Make sure you follow the instructions below and meet the timeframes allocated. If this session is not viewed in person by your assessor, you will attach proof of the meeting to Section 2 of your Project Portfolio.  As part of this meeting, you are required to demonstrate your ability to:   * take a leadership role in the meeting (e.g., start and conclude the meeting) * facilitate effective group interaction (e.g., ensure everyone has a chance to speak and provide input) * influence the direction of the discussion (e.g., use persuasive language and have a firm opinion and tone, keep the discussion on topic) * present information using appropriate style, language, register and vocabulary (e.g., conduct yourself in a professional manner where everyone understands what has been said, use terms applicable to business, operational plans and the industry in which the business operates) * listen to others and comprehend what they’re saying (e.g., do not interrupt and rephrase what has been said to confirm your understanding) * seek advice, feedback and support (e.g., ask relevant questions such as “do you agree with me?” and let others tell you what they think) * use appropriate paralinguistic communication (e.g., appropriate body language such as not folding your arms, supportive facial expressions such as frowning or smiling, polite tone and professional pitch).   You will be assessed on this. |
| Person eating | Complete Section 2 of your Project Portfolio.  To complete Section 2, you need to:   * develop and approve an operational and contingency plan. * document resource requirements. |
|  | Approval can be sought in any way as long as you adhere to any organisational communication and approval requirements. |
|  | Approval may for example be:   * question and answer session (each stakeholder has a copy of the operational plan) * executive team meeting * email requesting approval * updated project schedule. |
| Chat | Explain your operational plan to relevant work team(s). Meet with at least one stakeholder who is a co-worker and part of a team who will be responsible for an activity in the operational plan. |
|  | This meeting should take 20 minutes.  This meeting may take place with actual people who work for/are associated with your chosen business. Alternatively, classmates or your assessor may play the role of one or more team members.  This can either be viewed in person by your assessor or you may like to video record the session for your assessor to watch later. Your assessor can provide you with more details at this step. Make sure you follow the instructions below and meet the timeframes allocated. If this session is not viewed in person by your assessor, you will attach proof of the meeting to Section 2 of your Project Portfolio.  As part of this meeting, you are required to demonstrate your ability to:   * take a leadership role in the meeting (e.g., start and conclude the meeting) * present information using appropriate style, language, register and vocabulary (e.g., conduct yourself in a professional manner where everyone understands what has been said, use terms applicable to business, operational plans and the industry in which the business operates) * listen to others and comprehend what they’re saying (e.g., do not interrupt and rephrase what has been said to confirm your understanding) * seek support (e.g., ask relevant questions such as “Are the operational priorities clear?”) * use appropriate paralinguistic communication (e.g., appropriate body language such as not folding your arms, supportive facial expressions such as frowning or smiling, polite tone and professional pitch).   You will be assessed on this. |
| Document | Make sure you have answered all questions in Section 2. Submit to your assessor for review.  You are also required to attach certain documents as part of your evidence – review the documents you need to attach as outlined in Section 2 of the Project Portfolio and make sure you attach these upon submission. |

1. Managing operational performance

|  | Assume a period of time has passed.  If you are basing this on your own business, make sure you have data (that shows underperformance) available for the activity/KPI you selected to monitor.  If you are basing this on the case study, assume:   * invoices show that the advertising consultant has spent more than what was budgeted for. * a project schedule shows the advertising consultant is still delivering within agreed timeframes. |
| --- | --- |
| Person eating | Complete *Section 3* of your *Project Portfolio*.  To complete Section 3, you need to:   * confirm resources were acquired following organisational policy, practices and procedures. * incorporate intellectual property rights and responsibilities (e.g. via memo to staff). * plan and implement the monitoring and documentation of the performance for one activity. * assess the progress performance of the activity (using relevant data). * address the underperformance of a human or physical resource (at least one resource) and confirm support. |
| Chat | Meet with relevant stakeholders to discuss underperformance and negotiate variations to the operational plan. Meet with at least one of the stakeholders you identified as part of *Section 1* of your *Project Portfolio* who is associated with the underperformance*.*  Negotiate with stakeholder(s) to:   * establish reasons and solutions for underperformance. * negotiate variations to the operational plan required due to the underperformance. * establish support requirements.   *Remember that negotiation means that you discuss something to reach a mutually agreeable outcome.* |

|  | This meeting and negotiation should take 10 minutes.  This meeting and negotiation may take place with actual people who work for/are associated with your chosen business. Alternatively, classmates or your assessor may play the role of one or more team members.  This can either be viewed in person by your assessor or you may like to video record the session for your assessor to watch later. Your assessor can provide you with more details at this step. Make sure you follow the instructions below and meet the timeframes allocated. If this session is not viewed in person by your assessor, you will attach proof of the meeting to Section 3 of your Project Portfolio.  As part of this meeting, you are required to demonstrate your ability to:   * take a leadership role in the meeting (e.g., start and conclude the meeting) * facilitate effective group interaction (e.g., ensure everyone has a chance to speak and provide input) * influence the direction of the discussion (e.g., use persuasive language and have a firm opinion and tone, keep the discussion on topic) * present information using appropriate style, language, register and vocabulary (e.g., conduct yourself in a professional manner where everyone understands what has been said, use terms applicable to business, operational plans and the industry in which the business operates) * listen to others and comprehend what they’re saying (e.g., do not interrupt and rephrase what has been said to confirm your understanding) * seek advice, feedback and support (e.g., ask relevant questions such as “do you agree with me?” and let others tell you what they think) * use appropriate paralinguistic communication (e.g., appropriate body language such as not folding your arms, supportive facial expressions such as frowning or smiling, polite tone and professional pitch) * negotiate outcomes (discuss and agree on variations to the operational plan).   You will be assessed on this. |
| --- | --- |

| Document | Make sure you have answered all questions in Section 3.  You are also required to attach certain documents as part of your evidence – review the documents you need to attach as outlined in *Section 3* of the *Project Portfolio* and make sure you attach these upon submission. |
| --- | --- |

1. Submit your completed Project Portfolio

| Document | Make sure you have completed all sections of your *Project Portfolio*, answered all questions, provided enough detail as indicated and proofread for spelling and grammar as necessary. Remember to submit all necessary attachments as indicated. |
| --- | --- |

**Assessment Task 2: Checklist**

| Student’s name: | | | | | |
| --- | --- | --- | --- | --- | --- |
| Did the student: | | Completed successfully? | | | Comments |
| Yes | No | |  |
| Plan for an operational plan by:   * Outlining their role and its contribution to broader organisational objectives * Sourcing information regarding:   + stakeholders   + relevant legislation   + relevant organisational policies and procedures   + financial situation * Researching and analysing potential physical and human resource requirements and alternatives (including IP requirements, rights and responsibilities) * Showing mathematical calculations and reasoning related to budget and/or KPI requirements * Identifying data security requirements or issues related to potential activities? | |  |  | |  |
| Develop an operational plan by:   * meeting with relevant stakeholders and clients to collaborate and agree on the contents of an operational plan (activities, resources, timeframes, KPIs and monitoring processes) * developing an operational plan according to organisational requirements including:   + two objectives   + three activities per objective   + person responsible for completion of activity   + timeline requirements   + resources required (both physical and human)   + KPIs   + budget for the activity * developing a contingency plan for each activity on the operational plan, including:   + potential risks   + planned response to the risk * approving their operational plan * documenting resource requirements * explaining the approved operational plan to team members via oral communication? | |  |  | |  |
| Manage operational performance by:   * confirming human resource acquisition processes * confirming physical resource acquisition processes * incorporating intellectual property requirements in the execution of activities * planning and implementing monitoring processes for one activity and its related KPI * assessing the progress of one activity to achieve profit/productivity and document performance * negotiating variations to the operational plan with relevant stakeholders * addressing underperformance and confirming support for the resource? | |  |  | |  |
| Demonstrate effective oral communication and teamwork skills, including:   * taking a leadership role in the meeting * facilitating effective group interaction * influencing the direction of the discussion * presenting information using appropriate style, language, register and vocabulary * listening to others and comprehending what they’re saying * seeking advice, feedback and support * using appropriate paralinguistic communication? | |  |  | |  |
| Task outcome: | * Satisfactory | | | * Not satisfactory | |
| Assessor signature: |  | | | | |
| Assessor name: |  | | | | |
| Date: |  | | | | |

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| --- | --- |

| Student name: |  |
| --- | --- |
| Assessor name: |  |
| Date |  |

**Final assessment results**

| Task | Type | Result | | |
| --- | --- | --- | --- | --- |
| Satisfactory | Unsatisfactory | Did not submit |
| Assessment Task 1 | Knowledge questions | S | U | DNS |
| Assessment Task 2 | Project | S | U | DNS |
| Overall unit results |  | C | NYC |  |

**Feedback**

* My performance in this unit has been discussed and explained to me.
* I would like to appeal this assessment decision.

Student signature: Date:

* I hereby certify that this student has been assessed by me and that the assessment has been carried out according to the required assessment procedures.

Assessor signature: Date: