



BSBSMB412

Introduce cloud computing into business operation.

Assessment 2 of 2

Project



Introduction

This assessment assumes a simulated workplace – Ace Finance. Required workplace documents have been provided in hyperlinks under 'File Attached'. The assessment involves knowledge obtained in the learning platform, understanding workplace documents provided, and additional research to be completed.

In this simulated workplace, you will assume the role of a junior accountant and bookkeeper. Andrew will be your manager and will provide you with the direction of the tasks in the form of an email.

As per Andrews instruction, you be required to engage with fictitious clients of Ace Finance. For this assessment, the client is the company S & J Real-estate.

Assessment Instructions

This assessment includes two [2] case study tasks.

Each task needs to be completed in the templates that have been provided. The templates are hyperlinked under each task email as "File Attached". Alternatively, these templates can also be located in the learning platform, under the module 1 assessment 2 tab.

In this assessment you will be required to submit a voice recording of yourself. This can be recorded on a device such as a phone and uploaded into the platform as part of your submission. Alternatively, this can be recorded straight into the platform. Voicemails simulate an interaction with yourself and the client Joelle.



Reasonable adjustment

Students may request a reasonable adjustment for assessment tasks.

Reasonable adjustment usually involves varying:

- the processes for conducting the assessment [e.g. allowing additional time]
- the evidence gathering techniques [e.g. oral rather than written questioning, use of a scribe, modifications to equipment]

However, the evidence collected must allow the student to demonstrate all requirements of the unit.

Refer to the Student Handbook or contact your Trainer for further information.



Resources required for assessment.

To complete the assessments students, need to have access to:

- A computer with Internet and email access and a working web browser
- Computer Software:
 - MS Word
 - Adobe Acrobat Reader
- A video recording device [e.g., mobile phone, webcam, video camera, etc.]

Submission Requirements

To be eligible to be deemed competent in this assessment, you are required to submit the following documents. Do so by saving these to your computer, collate into a [Zip file](#), and submit your zipped documents once you believe you have successfully completed all required tasks.

Task 1 Requires:	
<input type="checkbox"/>	Implementation plan template
<input type="checkbox"/>	Memo template
Task 2 Requires:	
<input type="checkbox"/>	Staff training Presentation Maximum five (5) minutes in duration



Please consider the environment before printing this assessment.

Task 1



Implementation Plan

[FILE ATTACHED](#)

Hi there,

Congratulations, your business case was accepted by Sondra and S & J Real Estate.

Sondra and S & J Real Estate would like to proceed with your proposal. You will now need to:

1. Develop a detailed implementation strategy for the new system into S & J Real Estate. Include a training strategy and timeline for the new solution.
2. Write a memo to the staff at S & J Real Estate promoting the benefits of this solution. In the memo ensure you:
 - Explain the benefits to each department.
 - Explain the efficiencies that are to be expected from using the new system.
 - Reference the training strategy and how that will support the learning of the new system.

Ensure to keep S & J's collaborative culture throughout these plans.



Warm regards,
Andrew | [Manager](#)
andrew@ace.finance

Task 1- MARKING GUIDE

Students **MUST** provide an implementation plan that includes:

- ✓ Key legislation, regulation and/or policies and procedures to consider
- ✓ Three [3] short term goals
- ✓ Three [3] long term goals
- ✓ Implementation budget

Benchmark of a template:

IMPLEMENTATION PLAN
<p>Key Legislation, regulation and/or policies and procedures to consider when implanting this plan.</p> <ul style="list-style-type: none"> • the Australian Prudential Regulation Authority (APRA); • the Australian Securities and Investments Commission (ASIC); • the Reserve Bank of Australia (RBA); and. • the Australian Treasury. <p>Staff job roles and performance. Privacy policy Change management policy. Financial procedures</p>

Short-Term Goals (1st Month)

Short Term Goal 1	Set up and configure MYOB	
Date	Activity	Steps/action items to take
08/04/20xx 20xx must be the current year	Purchase and register MYOB	Finance Officer to Purchase/register service, e.g. MYOB
09/04/20xx		Finance Officer to attend a one-day training session: Setting up MYOB Accountright Software
10/04/20xx	Migration from AccountMe to Accountright	Finance Officer to Set up MYOB Accountright
10/04/20xx		Stop entering Financial Data in AccountMe

11/04/20xx		Finance Officer to Export data from AccountMe
11/04/20xx		Finance Officer to Import data to MYOB Accountright
11/04/20xx		CHECK Data Integrity: Run reports in MYOB and checks against Reports in AccountMe to verify the integrity of the data transferred.
12/04/20xx	Integrate MYOB to Salesforce	Salesforce Implementation Specialist to Integrate MYOB and Salesforce to send quote and sales data from MYOB to Salesforce
13/04/20xx	Payroll setup	Finance Officer to attend a one-day training session: Payroll Management
14/04/20xx		Finance Officer to set up Payroll

Short Term Goal 2		Launch MYOB with all staff
Date	Activity	Steps/action items to take
15/04/20xx	Training	Finance Officer to attend a one-day training session: Day-to-day processes
16/04/20xx		Finance, Sales Staff and GM to attend a one online training session: Process Sales
16/04/20xx	Accountright Launch	Start using Accountright Company-wide
17/04/20xx	Training & Coaching	Finance Officer to Coach General Manager how to access and interpret reports in MYOB
17/04/20xx		Finance Officer to attend a one-day training session: Advanced processes: Beyond day-to-day
Short Term Goal 3		Set up and use banks feeds to reconcile accounts
Date	Activity	Steps/action items to take
19/04/20xx	Training on Reconciling with Bank Feeds	Finance Officer to attend an online training session: Reconcile Smarter with Bank Feeds
20/04/20xx	Set up bank feeds	Set up and start using use banks feeds to reconcile accounts in MYOB

Long-Term Goals (Beyond 1st Month)

Long-Term Goal 1	Set up and use inventory management	
Date	Activity	Steps/action items to take
06/05/20xx	Training	Finance Officer to attend a one-day training session: Inventory Management
07/05/20xx	Inventory upload	Upload inventory and conduct stock take

Long-Term Goal 2	Set up projects in MYOB	
Date	Activity	Steps/action items to take
12/05/20xx	Set up projects	Set up Projects for accurate cost tracking
13/05/20xx		Finance Officer to set up custom project reports
16/05/20xx	Coaching session	Finance Officer to Coach General Manager how to access and interpret new project performance reports MYOB

Long-Term Goal 3	Create customer reports	
Date	Activity	Steps/action items to take
1/06/20xx	Meeting	Meet with GM and Accountant to discuss custom reporting requirements
2/06/20xx	Custom Reports Creation	Finance Officer to Create Custom Reports in MYOB
3/06/20xx	Coaching session	Finance Officer to Coach General Manager how to access and interpret new Custom reports MYOB

IMPLEMENTATION BUDGET

Implementation costs (List projected costs incurred in the implementation)	Month 1 Costs	Month 2 Costs	Month 3 Costs	Month 4 and Beyond Costs
Purchase MYOB AccountRight Plus subscription	\$100.00	\$100.00	\$100.00	\$100.00
Set-up and migration from AccountMe to MYOB AccountRight	\$1500	-	-	-
Monthly total	\$1500	\$100	\$100	\$100
Total implementation budget required	\$1900.00			

TRAINING PLAN

Students **MUST** provide a training plan that includes:

- ✓ **Role and responsibility for the training**
- ✓ **Timeline**
- ✓ **Activities to be covered**
- ✓ **Responsible person**
- ✓ **Resources needed**
- ✓ **A training strategy**

✓ **A communication strategy.**

Benchmark example:

Training Plan			
Role	Name	Responsible For	
Executive	Sondra		
Executitve			
Timeline	Activity to be covered	Responsible Person	Resources Needed
1 weeks	Training in the system specific to job role and usage.	Manager	Set up instructions Computer How-to-guides
2 weeks	Implementation of software – seek feedback	All staff – supervised by manager	Access to how-to-guides Access to IT support if needed
3 weeks	KPIs around new system	Management	Job roles and clear KPIs
Training Strategy			
<p>1. Introduce the new integrated system, provide training on key features and usage needed in your role.</p> <p>2. Role out implementation where staff can use the system in their every day role. Ensuring that IT and help are available for questions and things going wrong.</p> <p>3. Create KPIs around the new system relevant to job role.</p>			
Communication Strategy			
<p>Emailed memo of updates and training.</p> <p>Continuous improvement register.</p> <p>Channel set up for IT help and support.</p> <p>Weekly catch ups for feedback on the new system.</p>			

MEMO

Students MUST provide a memo that includes:

- ✓ Promote the benefits of the solution
- ✓ Explain the benefits to each department including efficiencies
- ✓ Reference the training strategy and how that will support the new learning

Benchmark example

memo

S & J Real Estate

To: Recipient names
From: Student
CC: Recipient names
Date: Date
Re: Subject

Comments: Hi all,

We have exciting news. S & J Real Estate will be transitioning to a new integrated accounting system called Xero.

What will this mean for you?

Xero is great for your clients and great for you. It has everything you need – invoicing, bank reconciliation, reporting, contacts, CRM integration and more.

The key features are:

Become more efficient

Each department will be able to do more work in less time.

Lower your prices to win clients from competitors working the old way, or move clients to fixed- price terms.

Boost your revenue

With data flowing in daily you will have more time for better paying work – like business analysis and provided high value advice.

Grow your practice

When you work more efficiently, you free up capacity to take you business wherever you want. Grow your clients, team and bottom line.

Task 2



Training

[FILE ATTACHED](#)

Hi there,

I require you to develop and deliver training to implement the new cloud computing system.

To do this I need you to deliver a training session for one aspect of the new cloud-based system.

Ensure you:

- Communicate and promote key features of the plan.
- Encourage the collaborative culture S&J Real-estate have when facilitating training.



Warm regards,
Andrew | Manager
andrew@ace.finance

Task 2 – Marking GUIDE

Students MUST:

- ✓ **Greetings**
- ✓ **Introduce themselves and provide a background of the project including key features.**
- ✓ **Explain the implementation plan and their reasoning behind their decisions**
- ✓ **Explain their training plan and their reasoning behind their decisions**
- ✓ **Demonstrate an engaging presentation through:**
 - Clear and projecting voice**
 - Consistent and engaging tone of voice**
 - Making eye contact with the camera**
 - Standing or sitting tall**
 - Professional presentation**
 - Communicate collaboration**
- ✓ **Must NOT exceed 5 minutes**
- ✓ **Must NOT have background noise.**

Team Training.

Create a presentation to facilitate training on your plans.

This could be in the form of a PowerPoint and voice-over recording or a video.

Considerations:

- Create a script and practice before recording.
- Ensure that there is no background noise.
- Ensure that you speak clearly to be understood by an assessor.
- Video presentation is to not exceed 5 minutes.

Did you?

<input type="checkbox"/>	Introduce yourself and provide a background of the project including key features.
<input type="checkbox"/>	Explain the implementation plan and your reasoning behind your decisions
<input type="checkbox"/>	Explain your training plan and your reasoning behind your decisions.
<input type="checkbox"/>	Ensure your presentation is engaging and creates a collaborative culture.



Congratulations you have reached the end of Assessment 2!

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