BSBOPS502

Manage business operational plans

Assessment 3 of 3

Project & Role Play

Assessor Guide

Version 1.0 December 2023

Assessment Instructions

Task overview

This assessment task consists of **four (4)** parts and related tasks, linked to the scenarios provided:

Part A; Plan implementation

Part B: Implement strategies

Part C: Evaluate progress and adjust Plans

Part D: Negotiate operational changes (Role Play)

Read each question carefully before completing each assessment task in the required format.

Additional resources and supporting documents

To complete this assessment, you will need to access the following:

- The updated Operational Plan developed in Assessment 2 Part D
- Document Management Policy & Procedures (IM002) (available on LMS)
- CBSA's Confidentiality Policy (IM007) (available on LMS)
- CBSA's Staff Management Policy & Procedures (HR002) (available on LMS)
- CBSA's Procurement Policy & Procedures (IM010) (available on LMS)
- CBSA's Communication Policy and Procedures (IM003) (available on LMS)

	The following assessment tasks use a simulated business called Complete Business Solutions Australia (CBSA). To complete the assessment tasks, you will access information, templates and workplace documents associated with CBSA. You can access CBSA's website to familiarise yourself with what CBSA does and the services it provides.

Assessment Information

Submission

You are entitled to three (3) attempts to complete this assessment satisfactorily. Incomplete assessments will not be marked and will count as one of your three attempts.

All questions must be responded to correctly to be assessed as satisfactory for this assessment.

Answers must be typed into the space provided and submitted electronically via the LMS. Hand-written assessments will not be accepted unless previously arranged with your assessor.

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.

For the purpose of this assessment, you are Jay Gartner, Business Compliance Specialist at CBSA.

Part A – Plan Implementation

Read the following email and its attachment, then complete the tasks that follow:

To:	Jay Gartner (Jay.gartner@cbsa.com.au)
From:	Henry Thomas (Henry.thomas@cbsa.com.au)
Date/time:	Tuesday 6:32 p.m.
Subject:	Operational Plan
Attachment:	Coaching Support Plan Template.docx

Hi Jay,

Prior to implementing the strategies in the operational plan, please develop:

- a procedure for monitoring and reviewing operational performance against goals, including a template form that can be used for each project
- a support plan so that staff can be coached during the changes.

Kind Regards,

Henry Thomas

Governance Manager

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

www.cbsa.com.au

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ATTACHMENT

Coaching Support Plan Template.docx

Coaching Support Plan

Who developed this plan?	
When was it developed?	
What is the purpose of this plan?	

What needs to be coached?	Who needs to be coached?	Who will do the coaching?	When must the coaching be completed?

Task 1

Using the *Policy & Procedures Template* provided below, develop an **Operational Performance Monitoring and Review Procedure** that can be used as a guide to monitor and review operational performance against the desired outcomes. It must detail:

- why performance monitoring is important
- a step-by-step process for monitoring and evaluating the performance used for the procedure. You should specify a particular model you wish to use, and then provide a breakdown of each of the stages that need to be undertaken. It should include stages around the following:
    - gathering the required data
    - analysing the gathered data against the necessary performance indicators
    - communicating the analysis and taking action as required
- the procedure should reference a *Performance Monitoring and Review Recording Form* that you will need to develop in the next task and that can be used to control the gathering and evaluation of performance data for each project. This must be referenced in the procedure steps and include relevant areas where details of the data to be collected can be entered including what, where, who, and when. You should refer to the requirements in the next task to help with development of this form
- the procedure should also detail how performance documentation will be stored. This should include a reference to the organisation's *Document Management Policy & Procedures*.

Assessor instructions

Student must develop an Operational Performance Monitoring and Review procedure in the template provided. The student must detail a process for monitoring and evaluating performance which allows the action to be undertaken if progress isn't measuring up. There are various models that the student could use, including the SAMIE model (Select, Analyse, Measure, Improve, Evaluate) or the PDCA model (Plan, Do, Check, Act) model. There are many others that are just as applicable. Sample answer is based on the planning and controlling cycle outlined in the learning.

Accept any reasonable suggestions that specify a logical sequence or approach for gathering, evaluating, and taking action if evaluation results are not as expected (or can be improved)

The process should reference to the Performance Monitoring and Review form where appropriate (which they develop in the next task). At the very least it should detail that this document is used during the process for guiding the monitoring and evaluating process for each project.

The process should reference the Document Management Policy and Procedures in regard to how performance documentation should be stored to meet organisational documentation requirements.

A possible sample answer is available below.

CBSA POLICY AND PROCEDURE TEMPLATE

ASSESSOR GUIDE

<<Add document's title>>

Operational Performance Monitoring and Review Procedure

Purpose:

<<add the document's purpose in about 20-50 words>>

To ensure all employees and their supervisors are aware of the expectations and opportunities available for planning, managing, reviewing, recognising and improving operational performance.

Procedure:

<<draft the content of the document in about 120-180 words >>

During the performance monitoring and review procedure CBSA is committed to follow the Plan – Monitor – Review and Control cycle, where staff is required to follow these steps to monitor and review project's performance:

Step 1. Plan - Determine and execute the plan

Step 2. Monitor - Access progress

Step 3. Review - Compare progress against desired outcomes

Step 4. Control - Take remedial if necessary

Managers and supervisors are required to complete the Performance Monitoring and Review Form to capture performance indicators, responsible person, and realistic timeframes for each performance indicator. The form also captures information about how outcomes are communicated.

Performance documentation should be stored according to CBSA's Document Management Policy and Procedures, as follows: electronic files will be saved centrally for access by staff in the organisation's cloud-based storage system. Files are archived as they are superseded by a new version. Files will not be deleted other than by an appointed person for maintenance purposes and only where a backup of the data exists.

Document Control:

Document Name:	Operational Performance Monitoring and Review Procedure
Organisation:	CBSA
Status:	Draft
Approved by:	Student should leave this section empty
Approval Date:	Student should leave this section empty
Proposed Review Date:	Student should leave this section empty

Task 2

In the space provided, **develop** a Performance Monitoring and Review Form template (mentioned in the previous task, in Task 1) and then **complete** it to align with the updated Operational Plan developed in Assessment 2.

In the form template you must capture information regarding:

- when the form was developed and by whom
- how data will be monitored, including:
    - what performance indicators the data needs to be collected against
    - what data needs to be collected
    - who will be collecting the data (this might be a person or an automated system)
    - when the data will be collected
- how outcomes of data evaluation will be communicated including:
    - what needs to be communicated
    - what format the communication should take
    - who needs to send the communication
    - who needs to receive the communication
    - when the communication needs to be sent.

Assessor instructions

Student must develop a Performance Monitoring and Review form which can be used for each project/operational plan to ensure that the performance strategies are monitored and evaluated. One possible template example is provided below that meets the necessary requirements.

The student must also complete the recording form to go with the updated operational plan developed in Assessment 2 detailing how the performance monitoring and evaluation will be managed. As each operational plan will be different, accept any reasonable monitoring details that are relevant to the performance indicators of their implementation strategies. As an example, if a strategy is to improve customer service, a performance indicator may be 'Increase customer satisfaction to 90%'. Based on this, what needs to be collected may be a monthly customer satisfaction survey which can be collected by the Marketing Strategist. The survey results may then be communicated to the Sales and Marketing Manager and/or the Managing Director by email on a monthly basis.

An example form with sample answers is available below:

PERFORMANCE MONITORING AND REVIEW FORM
(with sample answers)

Developed on:	Date
Developed by:	Jay Gartner (or student's name) – both accepted

How Data Will be Monitored

Performance indicator to be measured?	What needs to be collected?	Who will be collecting the data?	When does the data need to be collected?
'Increase customer satisfaction to 90%	Monthly customer satisfaction survey	Marketing Strategist	By the end of the month

How Outcomes Will be Communicated

What needs to be communicated?	In what format should it be communicated?	Who needs to send?	Who needs to receive?	When does it need to be sent?
Survey results	By email	Marketing Strategist	Sales and Marketing Manager and/or the Managing Director	On a monthly basis (one week after the survey is closed)

Task 3

Complete a coaching support plan using the template provided with the email. This plan is designed to ensure that appropriate coaching of necessary skills/knowledge is undertaken with those employees that will be affected by the operational strategies being implemented. Within the plan you must document:

- who developed the plan
- when it was developed
- what the purpose of the plan is
- **three (3)** things that staff will need to be coached on as part of the operational strategies being implemented. This should include:
    - what needs to be coached
    - who needs to be coached
    - who will do the coaching?
    - when the coaching must be completed by.

Save the completed coaching support plan as a separate document, using the following naming convention: BSBOPS502_Coaching Support Plan_student name_yymmdd.

Note: You will need to use this coaching support plan in Part C Task 2 of this assessment.

Assessor instructions

Student must complete the coaching support plan using the given template and saved as a sperate document, using the provided naming convention.

The details for this plan will be different for each student as each operational plan's strategies will differ. They should record:

- that they developed the plan and the date they developed it
- the purpose of the plan – accept any answer along the lines of 'to support the operational plan strategies'
- three (3) things that staff will need to be coached on as part of the operational strategies being implemented. This will differ for each student but should match appropriate skills or knowledge needed to understand for the strategy. Using the example provided above of 'Increasing customer satisfaction to 90%', one possible solution may be:

- what needs to be coached – sales and marketing strategist
- who needs to be coached – how to develop a customer survey and record its results
- who will do the coaching – sales and marketing manager
- when the coaching must be completed – in two weeks.

This is an example of a completed Coaching Support Plan:

Coaching Support Plan

ASSESSOR GUIDE

Who developed this plan?	Jay Gartner or Student's name (both accepted)
When was it developed?	Date
What is the purpose of this plan?	To support the operational plan strategies

What needs to be coached?	Who needs to be coached?	Who will do the coaching?	When must the coaching be completed?
Sales and marketing strategist	How to develop a customer survey and record its results	Sales and marketing manager	In two weeks

Part B – Implement Strategies

Read the following email, then complete the tasks that follow:

To:	Jay Gartner (jay.gartner@cbsa.com.au)
From:	Henry Thomas (henry.thomas@cbsa.com.au)
Date/time:	Friday 4:18 p.m.
Subject:	Implementation

Hi Jay,

I'm happy with the implementation plans that you have developed. As such, can you begin the implementation process for the three (3) strategies of your Operational Plan? They must be monitored throughout to ensure they remain on target. I also want you to look into how our Confidentially Policy can be integrated into some of our policies and procedures to ensure the protection of intellectual property during the implementation.

Kind regards,
Henry Thomas

Governance Manager
300 Fictional Way, Sydney, NSW 2000
Phone: 1800 111 222
www.cbsa.com.au

Task 1

In a phone call, Henry Thomas Governance Manager mentioned that currently there is no provision in CBSA's policies/procedures in regard to intellectual property rights and responsibilities. Based on the organisation's *Confidentiality Policy*, explain in the following table how you could update each of the following policies/procedures to secure the intellectual property rights and responsibilities of CBSA during these processes:

- Staff Management Policy & Procedures (HR002)
- Procurement Policy & Procedures (IM010)

Assessor instructions

Student responses are likely to include different wording than the sample answer provided. However, the acceptable responses must:

- be within the specified word limit
- reflect the characteristics described in the exemplar answer
- include an explanation of how they could update the CBSA's Staff Management Policy and Procedures and Procurement Policy and Procedures to secure the company's intellectual property rights and responsibilities.

A sample answer is provided below.

Adjustments for the *Staff Management Policy & Procedures* (30-50 words)	Add the following bullet point to Policy 1.2: 'Ensure that the intellectual property rights and responsibilities of the organisation and those involved in the recruitment process are maintained as per the Confidentiality Policy.'
Adjustments for the *Procurement Policy & Procedures* (30-50 words)	Add the following sentence to the end of 1.2.5: 'At all stages of the TM016 Goods and Service Contract negotiations, the confidentially arrangements of both parties should be adhered to as per the IM007 Confidentiality Policy.'

Task 2

Based on the updated Operational Plan (updated in Assessment 2 Part D), develop an induction plan for any new role, using the organisation's *Staff Management Policy & Procedures* as a guide. Create the induction plan below, in the space provided.

Assessor instructions

Student must create an induction plan in accordance with the Staff Management Policy and Procedures document.

Based on the Staff Management Policy and Procedures, the induction plan must capture the following information:

- induction details, such as employee's name, position, date and person conducting the induction
- topics relevant to the job role to be covered during the induction, such as:
    - requirements of the role
    - organisational expectations, goals, objectives
    - policies and procedures
    - legislation and regulations that affect role
    - recordkeeping
    - health and safety
    - Professional Development Plan
    - organisational systems and processes
    - introduction to the team.

This is an example of an Induction Plan:

Induction Plan

Induction details:

Employee	
Position	
Date	
Inductor	

Induction checklist

Topic	Completed (Y/N)
Explained requirements of the role	
Explained organisational expectations, goals, objectives	
Showed where policies and procedures are located	
Explained legislation and regulations that affect role	
Explained recordkeeping	
Explained health and safety	
Discussed professional development plan	
Explained organisational systems and processes	
Introduced to the team	

Employee's signature: ______________________

Task 3

Based on the updated Operational Plan (updated in Assessment 2 Part D), complete the **Request for Quote** template provided in relation to acquiring the new physical resource/s. Use the organisation's *Procurement Policy & Procedures* as a guide. You must complete a request form for each physical resource.

Assessor instructions

Student must complete a Request for Quote form for each physical resource regarding the new physical resource/s as per the updated Operational Plan, in accordance with the Procurement Policy & Procedure document.

Based on the Procurement Policy and Procedure, the Request for Quote form is required for purchases greater than $200.

An example is provided below of how the form should be completed if the physical resource was ergonomic office furniture. The evaluation section of the form should be left empty as there are no quotes provided yet,

REQUEST FOR QUOTE

Purchaser	CBSA
Goods/Services required	Ergonomic office furniture: • 3 ergonomic chairs • 3 stand-up desks
Quote Closing Date/Time	15 March 202X
Quote Validity Period	30 days
Purchaser Contact	jay.gartner@cbsa.com.au or any CBSA email address

The following criteria will be used to evaluation this quote against others:

Criteria	Weighting to decision	Evaluation *Once quote is provided*					
		Company A		Company B		Company C	
		Score	Total	Score	Total	Score	Total
Durability/quality of products	5						
Availability	4						
Cost/Discount	4						
Warranties	3						
<<add rows if required>>							
Total							

Part C - Evaluate Progress and Adjust Plans

Read the following email, then complete the tasks that follow:

To:	Jay Gartner (jay.gartner@cbsa.com.au)
From:	Henry Thomas (henry.thomas@cbsa.com.au)
Date/time:	Tuesday 9:20 a.m.
Subject:	Operational Performance Evaluation
Attachment:	Operational Performance Data.docx

Hi Jay,

Now that the operational strategies are being introduced to address operational issues, I have attached the latest operational performance data for the third quarter for your review. I want you to review the results to determine whether the strategies you have proposed are working to achieve CBSA's strategic goals.

Can you please review the results for the first and second quarter against the results of the third quarter to determine whether the strategies you have proposed are sufficient or not. If not, I would like you to make necessary modifications to the Operational Plan and the Coaching Support Plan you have developed to ensure the strategic goals are achieved.

Kind regards,

Henry Thomas

Governance Manager
300 Fictional Way, Sydney, NSW 2000
Phone: 1800 111 222
www.cbsa.com.au

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ATTACHMENT

Operational Performance Data.docx

OPERATIONAL PERFORMANCE DATA

Strategic Goal Performance Measures

Business data is gathered every quarter and reported to the Managing Director for review. The first three quarters' results of strategic goal performance are provided below:

PERFORMANCE MEASUREMENT			
Goal	1st Quarter	2nd Quarter	3rd Quarter
Acquire five new clients per month	Two new clients per month	Two new clients per month	Three new clients per month

Maintain 90% customer retention rate	80% retention rate	75% retention rate	70% retention rate
Grow business by 25%	The financial growth of 5%	The financial growth of 15%	The financial growth of 15%
Implement three new services	No new services implemented	No new services implemented	One new service implemented
Grow the workforce to 32 employees	Workforce numbers stable at 29	Workforce numbers increased to 30	Workforce numbers increased to 31

Task 1

Review the operational performance data for the third quarter to determine how effective the new strategies have been. Based on the results and the strategies in your Operational Plan, you need to modify the Operational Plan to try and ensure that the performance data will be improved for the fourth quarter.

This could involve:

- modifying existing strategies and action steps
- creating new strategies and actions steps.

List the changes you need to make in the Operational Plan, then modify the updated Operational Plan (developed in Assessment 2 Part D), save it with the following naming convention: BSBOPS502_ Operational Plan Update 2_student name_yymmdd and submit with the assessment.

Assessor instructions

Student should list the changes required to the Operational Plan, then they must update the Operational Plan, save it with the provided naming convention, and submit it for marking with the rest of the assessment.

List of changes	The performance results for the third quarter should allow for many different possible adjustments based on the student's strategies and actions in their operational plan. Accept reasonable changes using the following as a guide: ▪ Acquire five new clients per month: Slight increase from two customers to three for the 3rd quarter. This is still under the required five per month. This indicates a slow improvement and that a focus on implementing further training, sales and marketing strategies, and tools around gaining new customers could improve these results further. ▪ Maintain a 90% customer retention rate: Retention rates are dropping slightly each month, and this is the most under-performing strategic goal. This might indicate that customer service is an issue. Strategies such as loyalty programs, tools such as a CMS, customer service training to improve these results should be a high priority focus. If the student doesn't have any strategies around customer retention, then this should be added as this is the most in jeopardy of failing compared to the other strategic goals. ▪ Grow business by 25%: Business growth is steady at 15%. This indicates some possible issues which are generally related to other strategies (such as gaining new customers and retaining them).

	▪ Implement three new services: One new service has been created. Creating new services does take some time, so this indicates a good result, though and addition two new services are still required. ▪ Grow workforce to 32 employees: employee numbers are steadily increasing and are currently at 31. This is on track to meet its strategic goal by the end of the fourth quarter.

Task 2

Review the operational performance data for the third quarter to determine how effective the new strategies have been. Based on the results and the current coaching support that is being implemented, you need to modify the Coaching Support Plan developed for Part A Task 3 of this assessment to try and ensure that the performance data will be improved for the fourth quarter.

This could involve:

- modifying existing coaching support plan tasks
- creating new coaching support plan tasks.

Save the updated coaching support plan as a separate document, using the following naming convention: BSBOPS502_Updated Coaching Support Plan_student name_yymmdd.

Assessor instructions

Student must update the coaching support plan developed for Part A Task 3 of this assessment, save it with the provided naming convention, and submit it for marking with the rest of the assessment.

The performance results for the third quarter should allow for many different possible adjustments based on the current coaching support plan. Accept reasonable changes which are in line with the changes made to the Operational Plan. For example, if a new strategy is introduced in the operational plans such as a Customer Service initiative, then the Coaching Support Plan should be adjusted to reflect this.

This is an example of an updated Coaching Support Plan:

Updated Coaching Support Plan

ASSESSOR GUIDE

Who developed this plan?	Jay Gartner or Student's name (both accepted)
When was it developed?	Date
What is the purpose of this plan?	To support the operational plan strategies

What needs to be coached?	Who needs to be coached?	Who will do the coaching?	When must the coaching be completed?
Sales and marketing strategist	How to develop a customer survey and record its results	Sales and marketing manager	In two weeks

Customer Service initiative	Customer support staff	Sales and marketing manager	In 2 weeks

Part D – Negotiate Operational Changes (Role Play)

Read the following email, then complete the tasks that follow:

To: Jay Gartner (jay.gartner@cbsa.com.au)

From: Henry Thomas (henry.thomas@cbsa.com.au)

Date/time: Thursday 10:57 a.m.

Subject: Negotiate and Agree on Plan Changes

Hi Jay,

Thanks for reviewing the performance data for the third quarter and adjusting your plans as necessary. Can you please present the modified plans to representatives from our internal staff who will be affected by these changes? I would like you to get their feedback on whether they believe these changes will be significant or not and negotiate the changes until all parties are satisfied.

I will be attending the meeting so you can gain approval on the updated plans if negotiation is successful.

Kind regards,

Henry Thomas

Governance Manager

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

www.cbsa.com.au

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Task 1

Review the CBSA's *Communication Policy & Procedures* (available on LMS) for the delivery of presentations, and then undertake a consultation session with representatives of CBSA's staff and important stakeholders (role played by friends, family members or fellow students) in line with workplace procedures.

Role play instructions

The role play/meeting must include at least **two (2)** participant/s, must not exceed **15–20 minutes** duration and must address the following:

- an outline of the changes you have made to the operational plan
- an outline of the changes you have made to the coaching support plan
- negotiation of the changes with the consultation session audience until all parties are in agreement
- at the end of the meeting, obtain approval verbally from Henry Thomas Governance Manager.

In this task you will participate in a role/play meeting with others. These may be resourced using one or both of the following options:

1. Friends or family members
2. Fellow student/s who will play the role of a team member. Please contact your fellow student/s via the Discussion Forum and coordinate your role play with them directly.

Option 1: Friends or family members

Should you complete this task with friends or family members, you must fully brief all participant/s, providing them with the context to the role play/meeting and the role outline to play so that they can prepare for the recording.

Friends or family members will need to state their name and the role they are playing at the start of the recording to inform consent.

Option 2: Fellow student/s participant

Fellow students participating in the recording must be provided with context to their role and responsibilities in the session and have reviewed the assessment activity so that they can prepare for the recording.

Students will need to state their name and the role they are playing at the start of the recording to inform consent.

Participants' briefing instructions:

The job role of **Participant 1** and **Participant 2** will depend on the Operational Plan developed in Assessment 2. You (the student) must allocate the roles based on the Operational Plan and CBSA's organisational chart. (You can utilise the job roles used in the previous Role Play as part of Assessment 2 Part C Task 1.)

Participants should ask questions to clarify the meaning of any aspect of the updated plans presented, such as 'What did you mean by change?' or 'Could you give examples of how this would look like?'

Participants should make suggestions for improvements that can be implemented into the plan. Suggestions for improvement can be allocating more (or less) resources to a strategy or fine-tuning performance indicators identified.

If student's argument is persuasive enough, participants can agree with students.

At the end of the meeting, one of the participants will also play the role of Henry Thomas Governance Manager who will provide approval if the negotiation was successful.

Recording instructions

Your role play must be recorded with all participants captured in a virtual room using a system such as Zoom, Skype or Teams.

Consent to participate in the recording must be captured for all participants at the start of the meeting. This is achieved by the student reading the following statement at the start of the recording, with all participants replying with their name and the role they are playing to inform consent.

"This session/presentation is being recorded for assessment purposes for my course with Swinburne Open Education. This session will be recorded and submitted through my course online learning platform to my Assessor for grading. All participants in this session indicate their consent to be included in this recording by stating their name and the role they are playing."

The time taken to capture consent at the start of the recording does not count towards the recording time limit.

Save the recording using the following naming convention: BSBOPS502_Negotiation_student name_yymmdd and include this recording as part of your assessment submission.

Assessor instruction

Student must conduct and record a meeting with two (2) participants using a system such as Zoom, Skype or Teams. Student must allocate the roles of the participants depending on the Operational Plan (roles can be the same as the roles used in Assessment 2's role play). For example, if they nominate the Training Manager and HR Manager as responsible personnel for the strategies identified, then Participant 1 can play the role of the Training Manager and Participant 2 can play the role of the HR Manager. One participant will also play the role of Henry Thomas Governance Manager who will provide approval if the negotiation was successful.

Complete the following Observation Checklist to capture your observations and to ensure students demonstrated each of the performance criteria outlined in the checklist.

Where one or more criteria are not demonstrated to a satisfactory standard, make a specific comment for each criterion requiring re-submission, including constructive feedback in the Student Assessment Feedback Form.

Observation Checklist *(to be completed by the Assessor)*	
Use this checklist while reviewing the recorded role play:	
Did the student...	**Satisfactory/Not Yet Satisfactory**

a. Outline the changes made to the operational plan using appropriate register, vocabulary and paralinguistic features? Student must outline the changes made to the operational plan (as per Operational Plan Update 2)	☐Satisfactory ☐ Not Yet Satisfactory
b. Outline the changes made to the coaching support plan using appropriate register, vocabulary and paralinguistic features? Student must outline the changes made to the coaching support plan (as per Updated Coaching Support Plan)	☐Satisfactory ☐ Not Yet Satisfactory
c. Listen and comprehend information from stakeholders, responding to questions appropriately? Student must be able to respond to questions appropriately.	☐Satisfactory ☐ Not Yet Satisfactory
d. Collaborate with others to negotiate and achieve joint outcomes, playing an active role in facilitating effective group interaction, influencing the direction and taking a leadership role on occasions? Student must be able to negotiate solutions, facilitate the interaction and take leadership role during the meeting by opening and closing the meeting and ensuring that all participate can express their opinion.	☐Satisfactory ☐ Not Yet Satisfactory
e. Gain approval from designated person? Student must be able to request and gain approval from Henry Thomas Governance Manager if the negotiation was successful.	☐Satisfactory ☐ Not Yet Satisfactory

Assessment checklist:

Students must have completed all questions within this assessment before submitting. This includes:

Part A – Plan Implementation		
Task 1	Develop an Operational Performance Monitoring and Review Procedure in the template provided	☐
Task 2	Develop and complete a Performance Monitoring and Review Form in the space provided	☐
Task 3	Complete the Coaching Support Plan and submit it with the assessment	☐
Part B – Implement Strategies		
Task 1	Complete table with adjustments for the policy and procedure documents	☐
Task 2	Develop an induction plan in the space provided	☐
Task 3	Complete the Request for Quote Form in the template provided	☐
Part C – Evaluate Progress and Adjust Plans		
Task 1	• List modifications in the space provided • Modify the updated Operational Plan and submit it with the assessment	☐
Task 2	Update Coaching Support Plan and submit it with this assessment	☐
Part D – Negotiate Operational Changes (Role Play)		
Task 1	Conduct role play and submit recording with the assessment	☐

Congratulations you have reached the end of Assessment 3!