

Colab



BSBESB406

Assessor Guide

Establish operational strategies and procedures for new business ventures

Assessment 2 of 3

Project – Part 1

Assessment Instructions

Task overview

This assessment is Part 1 of the Project, and it is divided into **two (2)** sections, Part A and Part B, and related tasks. This includes:

- Part A: Develop operational plan
- Part B: Implement strategies and procedures

Read each question carefully before typing your response in the space provided.

Additional resources and supporting documents

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

- Eco Aussie Office Desks' Operational Plan template
- Eco Aussie Office Desks' Return and Refund Policy and Procedure
- SurveyMonkey
- Eco Aussie Office Desks' Inventory Management Template (Excel spreadsheet)
- Relevant legislations, industry standards and awards
- Fair Work's pay calculator

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.





Please consider the environment before printing this assessment.

SCENARIO



The following tasks use a simulated business called Eco Aussie Office Desks. The business has been running for a year and it focuses on selling ready-to-assemble affordable home office furniture made in Australia by retired craftsmen who use wood, melamine and metal.

Each unit comes with the tools for easy assembly. The desks are made in Australia and bought at a wholesale price from Nature Furniture. Eco Aussie Office Desks is the sole seller of the desks from Nature Furniture. The founder and owner of Eco Aussie Desks, Vanessa Zoltan came up with the idea of the company when she was talking to her grandfather, who is one of the men at Nature Furniture.

The owner, Vanessa's vision is to be the No. 1 seller in Australia of sustainable home office desks that people will use and keep for a lifetime. The unique selling proposition is that the desks are hand-made in Australia by retired craftsmen and the desks are made to fit into small spaces for people working from home. Some parts of the desks are made from recycled materials.

Initially, Vanessa launched her business as a sole trader with limited outlay. The business operates as an online store from a website, including an online payment system that Vanessa monitors from a home office. Orders would only be placed with the manufacturer when an order has been received online and paid in full by customers. Vanessa organised delivery to the customer by a courier at \$70 per delivery. Due to customer demand for *Click and Collect Service* and the increased number of orders that delayed manufacturers, Vanessa had to hire a warehouse to store products.

Vanessa is determined to build her business on transparency and to provide first-class customer experience. She is committed to seek customers' feedback to continually improve their experience. She believes in building and maintaining strong and positive relationships based on mutual respect with all stakeholders, including suppliers, manufacturer and delivery personal. She is dedicated to establishing and maintaining a physically and mentally safe working environment for all stakeholders.

At the moment, Vanessa is using Excel spreadsheet to manage budget and inventory list. She talks to warehouse manager and other stakeholders via telephone.

Due to the increased market demand for home office furniture, Vanessa rented two warehouses, one in Richmond (NSW) and one in Robina (QLD). She employed a warehouse manager for each location to manage the stock and 'Click and Collect'. She also employed a part-time administrative officer to help out with administrative duties. She is not sure whether she needs more staff to be hired.

To ensure that Vanessa prioritises the safety and health of her warehouse staff she had identified some work health and safety and environmental issues.

1. **Traffic management** – vehicles moving stock in and out of the warehouse, reversing, loading and unloading is often results in injuries to workers. She is considering how to eliminate this risk by separating vehicles and pedestrians within the warehouse site and ensuring everyone who enters the warehouse must wear high visibility gear.

2. **First aid** – there is always the need for first aid equipment, and she needs to ensure the warehouse staff has access to and facilities for administering first aid
3. **Forklift injuries** – all warehouse managers must hold a high-risk work forklift license and pre-start checks should always be performed before it is operated
4. **Warehouse racks** – all racks used in the warehouse to store the office desks must be designed specifically to the size, shape and weight of the products being stored. The racks must also be maintained according to the manufacturers' instructions.
5. **Air quality** – To ensure good air quality in the warehouse and prevent the warehouse managers being impacted by environmental hazards they need to ensure that there is effective air flow in the warehouse, and they have the heating and cooling facilities in the winter and summer months.
6. **Health and safety: work environment** – To ensure warehouse managers' health and safety, effort must be made to ensure the work environment has appropriate level of noise or there are strategies in place to reduce its' impact on human health as a noisy work environment can cause headaches in the short term.
7. **Health and safety: workplace ergonomics** – To ensure employees' health and safety, good workplace ergonomics must be established and maintained, including sufficient lighting and comfortable desk chairs/work spaces as their lack can lead to health problems, fatigue and reduced productivity and work quality.

Eco Aussie Office Desks' business goals:

- To be the number one provider of ready to assemble, Australian, handmade and sustainable office desks in Australia
- To increase customer satisfaction by offering a 'Click and Collect' service, reduce delivery time and seek customer feedback to continually improve the customer's experience
- To care for our employees, customers and suppliers by acting with uncompromising honesty and integrity in everything we do

Eco Aussie Office Desks' business objectives:

- To sell five (5) desks per day
- To ensure all products meet quality specifications
- To ensure customers using 'Click and Collect' service can pick-up their order within 48 hours from date of purchase
- To ensure all customer deliveries are received within five (5) days from date of purchase
- To value all employees by meeting weekly to review their performance and support their physical and mental wellbeing

According to Eco Aussie Office Desks' business plan, the business aims to realise a profit of \$40,000, before tax, in the first year; \$50,000 in the second year, and \$60,000 in the third year.

Now that Vanessa's business is expanding, she needs to develop an operational plan with relevant set of policy and procedure documents to effectively manage her business. She will need to create a system to evaluate business performance and review and update business operations based on requirements.

In order to complete the assessment tasks, you will need to access information and documents associated with Eco Aussie Office Desks, as indicated in the following assessment tasks.

Part A: Develop Operational Plan

Task 1

Access the [Eco Aussie Office Desks Operational Plan template](#), then complete the 'Business Goals and Objectives' section of the operational plan with:

- **two (2)** business goals
- **two (2)** business objectives, and
- **four (4)** action points to fulfil the identified business goals and objectives.

For each recommended actions identify the person responsible, i.e. the business owner and/or warehouse manager(s).

When complete, save the document using the following naming convention: **BSBESB406_Project 1_Operational Plan_yourname_yymmdd**.

You will continue updating the document as you go through the assessment tasks within Part A.

Assessor instructions: Students must list 2 business goals and 2 business objectives in the operational plan, based on the scenario.

Sample answers (also in the Operational Plan Assessor Guide)

Students must list any 2 of the following business goals:

1. To be the number one provider of ready to assemble, Australian, handmade and sustainable office desks in Australia
2. To increase customer satisfaction by offering a 'Click and Collect' service, reduce delivery time and seek customer feedback to continually improve the customer's experience
3. To care for our employees, customers and suppliers by acting with uncompromising honesty and integrity in everything we do

Students must list any 2 of the following business objectives:

1. To sell five (5) desks per day
2. To ensure all products meet quality specifications
3. To ensure customers using 'Click and Collect' service can pick-up their order within 48 hours from date of purchase
4. To ensure all customer deliveries are received within 5 days from date of purchase
5. To value all employees by meeting weekly to review their performance and support their physical and mental wellbeing

Students must list any 4 of the following actions as long as they align with the selected business goals and objectives. Student must identify the person responsible for the implementation of the actions.

1. Have quality control systems in place to ensure manufacturer provides good quality products that meet quality specifications (Responsible person: business owner)
2. Provide sufficient training for all employees regarding their duties and policies and procedures in place (Responsible person: warehouse managers)
3. Organise reliable courier service from manufacturer to customers and to warehouse for quick delivery and efficient 'Click and Collect' service (Responsible person: business owner/warehouse managers)
4. Regularly collect customers' feedback to feed in quality improvement (Responsible person: business owner/warehouse managers)
5. Develop policies and procedures to guide all employees in daily tasks to provide high quality customer service and to perform tasks in professional manner, aligned to company's vision and values (Responsible person: business owner)
6. Develop clear KPIs for employees and communicate expectations clearly to ensure KPIs are met (Responsible person: business owner)

Task 2

Access the Eco Aussie Office Desks Operational Plan template used in **Task 1**, then complete the 'Risk Assessment Plan' section by identifying:

- **two (2)** work health and safety issues/risks, and
- **two (2)** environmental issues.

For each issue/risk identified, determine the likelihood and severity by using the risk matrix provided in the operational plan. Suggest **one (1)** strategy for each risk identified to minimise risk factors.

For each strategy identify the responsible person. Save the document by clicking on 'Save'.

Assessor instructions: Students must identify a minimum of two WHS risks/issues and two environmental issues, identify the WHS risks' likelihood and severity and suggest a minimum of one strategy for each risk identified to minimise risk factors.

Student must list 2 WHS risks/issues from the following:

1. Risks/issues related to traffic management – vehicles moving stock in and out of the warehouse, reversing, loading and unloading is often results in injuries to workers.
2. Risks/issues related to first aid and relevant equipment, including access to and facilities for administering first aid
3. Risks/issues related to forklift injuries
4. Risks/issues related to warehouse racks

Student must list 2 environmental issues from the following:

1. Air contamination caused by lack of warehouse ventilation
2. Weather causing warehouse to be too cold or too hot and unsafe to work
3. A noisy work environment can cause headaches in the short term
4. Insufficient lighting and uncomfortable desk chairs/work spaces are examples of workplace ergonomics that can lead to health problems, fatigue and reduced productivity and work quality.

Sample answers, including completed risk assessment, strategies to minimise risk factors and responsible person, are provided in the *Operational Plan Assessor Guide*.

Task 3

You are required to implement the strategies identified in Task 2 to minimise risk factors regarding work health and safety and environmental issues: write an email to the warehouse managers and delivery partners, outlining **three (3)** steps that will need to be followed for maintaining work health and safety in the warehouse.

Use the template below to write up your email, include a rationale behind the strategies. The implementation of these strategies will be effective immediately.

[Approximate word count: 130-150 words]

Assessor instructions: Students must draft an email to warehouse managers and delivery partners, outlining a minimum of three (3) steps that will need to be followed for maintaining work health and safety in the warehouse. The strategies must align with the strategies identified in Task 2 [as it appears in the Operational plan's 'Risk assessment plan']. The email must be clear, concise and include the implementation of the strategies are effective immediately, staff is expected to follow them starting from receiving the email.

Sample answer is provided below.

To: Warehouse managers and delivery partners
Subject: Work health and safety strategies
[Write your email here]
<p>Dear warehouse managers and delivery partners,</p> <p>As valued members of our business community, your health and safety are important to us. It is therefore essential that from now on you follow these three (3) steps for ensuring your health and safety during your work in the warehouse:</p> <ol style="list-style-type: none">1. Ensure all warehouse racks are installed and maintained to the size, share and weight of the products being stored2. Ensure that windows are kept open for cross ventilation and healthy airflow3. Everyone who operates a forklift must hold a current high-risk forklift license and must maintain their license. <p>You are kindly expected to follow the above outlined strategies from receiving this email. As a sign of acknowledgement, please reply to this email.</p> <p>If you have any questions or need further clarification, please feel free to contact me.</p> <p>Warmest regards, Vanessa</p>

Task 4

Based on the health and safety risks and mitigation strategies listed in the Eco Aussie Office Desks Operational Plan used for Task 1 and Task 2 above, draft a risk management procedure that complies with the work health and safety/occupational health and safety legislation relevant to your state/territory.

When drafting the risk management procedure, keep in mind that, according to the operational plan, the company employs two full-time warehouse managers and one part-time administrative officer working from home.

Complete the following table with your responses.

Assessor instructions: Students must complete the table provided with a risk management procedure. Benchmark answers are provided.

RISK MANAGEMENT PROCEDURE				
<p>Objective: Eco Aussie Office Desks is committed to provide and maintain a safe work environment for all employees, clients and stakeholders in company’s warehouses, one being located in Richmond (NSW) and the other in Robina (QLD).</p> <p>This procedure aims to provide a clear guideline for all employees to provide and maintain a physically and mentally safe environment and monitor the health of workers and conditions at the workplace.</p>				
Identify the WHS/OHS legislation for the states where the company has a warehouse [15-20 words]	<p>Student must identify the legislation relevant to the 2 states/territories relevant to scenario (NSW and QLD): NSW: Work Health and Safety Act 2011 (NSW) QLD: Work Health and Safety Act 2011 (Qld)</p>			
List three (3) considerations that Vanessa would need to include in the WHS/OHS procedure for team members working remotely or from home [25-30 words]	<p>Students must list 3 considerations along the lines of the following:</p> <ul style="list-style-type: none"> report incidents or injuries while working at home or remotely provide guidance on what a safe (home) work environment is provide and/or allow workers to borrow equipment and resources required for safe work environment provide information supporting mental health and wellbeing- external site 			
<p>Based on the hierarchy of risk control, identify with a ✓ the responsible person for each risk management activity regarding work health and safety</p> <p>Instructions to the assessor: Student must mark with a ✓ the responsible person for each risk management activity regarding work health and safety [see sample answer provided]</p>	Activity description	CEO/Owner	Warehouse manager	All staff
	1. Establish the context associated with the program goals and activities	✓		
	2. Identify risks		✓	✓
	3. Analyse risks			✓
	4. Evaluate risks	✓		✓
5. Treat risks, including a cost/benefit analysis of the treatment options			✓	

	6. Continually monitor and review the risks and treatments	✓	✓	
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Task 5

Access the Eco Aussie Office Desks Operational Plan template used for Task 1 and Task 2 and complete the 'Key Performance Indicators' section of the operational plan by developing **three (3)** operational key performance indicators (KPIs) that align to business plan described in the scenario and to the business strategies listed in the operational plan.

For each KPI, include the technology that is used to optimise the business performance of this KPI. Save the document by clicking on 'Save'.

The document must be named using the following naming convention: **BSBESB406_Project 1_Operational Plan_yourname_yymmdd**.

Add a date to the 'Version control' section, then convert the operational plan into pdf, ready for submission.

Submit the Operational Plan document together with the completed assessment document and other requirements as indicated in the following assessment tasks. For a list of all requirements for this assessment consult the *Assessment checklist* at the end of this assessment.

Assessor instructions: Students must list the three KPIs in the operational plan, based on the scenario, as indicated in the sample answers provided. Performance Target and Target Date can vary from sample answers given; however, they need to be realistic to the KPIs listed. Recommended technologies must also align with sample answers.

Sample answers are provided in the **Operational Plan Assessor Guide**.

Task 6

As part of the company's quality assurance process, access, then review and evaluate the company's [Return and Refund Policy and Procedure](#) in line with the following criteria:

1. The Australian Competition and Consumer Commission's (ACCC) requirements regarding:
 - [repair, replace and refund](#)
2. Eco Aussie Office Desks company's vision regarding workplace culture:
 - Vision: To delivery first class customer service, transparency and a business built on strong relationships and a safe working environment
 - Culture: To care for our employees, customers, and suppliers by acting with uncompromising honesty and integrity in everything we do
3. Industry standards, such as:
 - Quality specification ([AS/NZS 4442:2018](#))
 - Pricing obligations, such as:
 - [Honour incorrectly priced items](#)

- [Displaying prices](#)

Complete the table below with your findings and make suggestions for improvements if applicable.

Assessor instructions: Student must analyse the provided Return and Refund policy and assess whether it aligns with the criteria listed. Students' responses must align with the provided sample answers.

Sample answers are provided below.

How does the Return and Refund Policy and Procedure align with the following	Does the Return and Refund Policy and Procedure align with criteria?	Suggestions for improvements (if applicable) (70-120 words)
Australian Competition and Consumer Commission's (ACCC) requirements regarding repair, replace and refund	<input type="checkbox"/> Aligns <input checked="" type="checkbox"/> Does not align	<p>Refunds policy needs to be updated to include these specifications from ACCC:</p> <p>"You are entitled to return a product if you believe that there is a problem. You are generally responsible for returning the product if it can be posted or easily returned. You are entitled to recover reasonable postage or transportation costs from the business if the product is confirmed to have a problem, so keep your receipts. You do not have to return products in the original packaging in order to get a refund. When a product is too large, too heavy or too difficult to remove, the business is responsible for paying the shipping cost."</p> <p>Source: https://www.accc.gov.au/consumers/consumer-rights-guarantees/repair-replace-refund</p>
Company's vision regarding workplace culture	<input type="checkbox"/> Aligns <input checked="" type="checkbox"/> Does not align	<p>Not aligned to company's vision and culture as only accepting returns less than 5 days after purchase is very limiting for the for the customer not good customer service and is not aligned to the company aiming to sell high quality products that they should be able to provide a lifetime guarantee for quality and durability. The language in the policy is also not supportive and wouldn't be described as acting with integrity.</p>
Industry standards regarding quality specification and pricing	<input type="checkbox"/> Aligns <input checked="" type="checkbox"/> Does not align	<p>Not aligned and policy should be updated to include products must meet AS/NZS 4442:2018.</p> <p>Also, the policy and procedure states that the higher price is the price the customer will be</p>

		charged, whereas, according to pricing obligations: "If a retailer displays an item with multiple prices, they must sell the product at the lower of the marked or displayed prices."
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Part B: Implement Strategies and Procedures

Task 1

As the company has been growing and it has two warehouses in two different states now, Vanessa employed two full-time warehouse managers and a part-time administrative officer to help out with administrative duties.

By completing the table below, create a procedure document to implement a system to evaluate and measure financial and non-financial performance within the business. The procedure should include a step-by-step guide to ensure performance is monitored, measured and regularly evaluated.

Assessor instructions: Students must complete the table provided to implement a system to evaluate business performance. Students' responses must align with sample answers.

Sample answers are provided below.

BUSINESS PERFORMANCE MANAGEMENT SYSTEM	
<p>Objective: Eco Aussie Office Desks is a small business that aims to be a sustainable, customer-focused but for-profit company. The company aims to obtain a 5% increase in net profit every quarter.</p> <p>This business performance management document outlines how financial and non-financial performance within the business will be monitored, measured and evaluated on a monthly basis.</p> <p>This procedure aims to encourage Eco Aussie Office Desks to continually grow and develop by reaching the targets set by the management.</p>	
BUSINESS PERFORMANCE MANAGEMENT PROCEDURE	
Planning	
Identify two (2) key strategies required for effective business performance evaluation (10-15 words each)	<p>1. Identify the relevant objectives for the given performance period</p> <p>2. Set realistic performance targets and/or KPIs and communicate them to relevant personnel</p> <p>Additional responses:</p> <ul style="list-style-type: none"> Ensure personal involved have access to relevant information
Execution: Financial KPIs	
Identify three (3) key metrics to effectively measure financial performance (15-30 words each)	<p>1. Gross profit margin to measure what percentage of revenue is left after subtracting the cost of goods sold</p> <p>2. Net profit margin to measure what percentage of revenue and other income is left after subtracting all costs for the business, including costs of goods sold, operating expenses, interest, and taxes</p> <p>3. Inventory turnover to measure how many times per accounting period the company sold its entire inventory. It gives insight into whether a company has excessive inventory relative to its sales levels.</p>

	<p>Additional responses:</p> <ul style="list-style-type: none"> • Operating cash flow to measure of how much cash the business has as a result of its operations • Seasonality to measure of how the period of the year is affecting your company's financial numbers and outcomes
Identify three (3) methods to effectively evaluating financial performance (15-20 words each)	1. Regularly/monthly review your finances, including cash flow, working capital, cost base, borrowing and growth
	2. Regularly/monthly review turnover ratio to determine if inventory is in demand, obsolete, or if the business is carrying too much.
	3. Regularly/monthly review return on assets to determine how well the company's assets are being employed to become more profitable.
	<p>Additional responses:</p> <ul style="list-style-type: none"> • Regularly review and redefine your business goals and targets based on financial performance • Regularly review and assess business efficiency based on financial performance
Execution: Non-Financial KPIs	
Identify three (3) key metrics to effectively measure non-financial performance (15-20 words each)	1. Conversion rate to measure the percentage of interactions that result in a sale
	2. Retention rate to measure the portion of consumers who remain customers for an entire reporting period
	3. Customer satisfaction index to measure the company's success at meeting customers' needs
	<p>Additional responses:</p> <ul style="list-style-type: none"> • Contact volume by channel to support requests by phone or email to track the number of support requests month-to-month. • Net promoter score to measure the likelihood that customers will recommend a product to others • Staff turnover rate to measure the success of retention efforts for top performers
Identify three (3) methods to effectively evaluate non-financial performance (10-20 words each)	1. Regularly/ monthly conduct a competitor analysis to reflect on business strategies and make adjustments if needed
	2. Regularly/ monthly conduct a customer and market analysis to assess customers' needs and market positioning
	3. Regularly/ monthly conduct employee performance reviews to evaluate an employee's work performance, identifying strengths and weaknesses, offer feedback, and set goals for future performance in accordance with business goals and targets
	<p>Additional responses:</p> <ul style="list-style-type: none"> • Regularly send surveys to staff to gather staff feedback

Task 2

In her business plan, Vanessa estimated that the business needs to sell 30 desks a week in the first year (52 weeks), the selling price being the wholesale price (\$250) + 30% profit margin.

She received the following bank statement summarising the sales revenue received for the first quarter:

July	\$39,000
August	\$65,000
September	\$30,875

Did the company reach the target sale for the first quarter? Complete the following table to calculate actual sales and variances for each month and in total for the first quarter.

Once the table is completed, in the answer box following the table explain whether each month's sales target was or was not met and indicate the performance variance amount either above or below the target. In your answer also include the digital tool you have used in your calculation.

	Sales Target	Actual Sales	Variance
July	\$42,250	\$39,000	\$3,250
August	\$42,250	\$65,000	\$22,750
September	\$42,250	\$30,875	\$11,375
Quarter 1 - Total	\$126,750	\$134,875	\$8,125

[Approximate word count: 45-50 words]

Assessor instructions: Students must complete the table above with their calculations for actual sales and variances. explain whether the target has been reached for the first quarter based on their calculations. In their response, students must identify how the target was/wasn't met for each month and they also must identify the digital tool used for their calculation. However, they are not required to detail the calculation. Workings are provided for assessor's reference.

Sample answers are provided below and, in the table, above.

[Type your response here]

Student must identify that the first quarter's target was reached, bringing an additional \$8,125 in sales. Monthly sales Target was met in September but not in July and August. Student must identify the digital tool used for calculation, such as phone's or PC's calculator, mechanical calculator, Excel spreadsheet.

Calculation:

Workings for solution:

Sales per desk = \$250 + 30% = \$325

Sales Target per week = \$325 x 30 = \$9,750

Sales Target per year= \$507,000

Sales Target per month = \$42,250

[\$250+30%] X 30 X 52 = \$325 X 30 X 52 = \$507,000 target for the first year. \$507,000 / 4 = \$126,750 target for a quarter. First quarter's total [July, August, September] is \$134,875. \$134,875 - \$126,750 = \$8,125 profit for the first quarter.

Task 3

As part of the company's quality assurance system, Vanessa decided to set up a system to monitor customer satisfaction. She is considering sending out a short survey after each purchase and for regular customers at a three-month interval. Draft a step-by-step guide for staff regarding the evaluation of customer satisfaction.

Assessor instructions: Students must complete the table to develop a step-by-step guide for staff regarding the evaluation of customer satisfaction. Students' responses must align with sample answers.

Sample answers are provided below.

Customer Feedback Management System	
Objective: The objective of this system is to evaluate customer satisfaction at Eco Aussie Office Desks.	
Steps to design and create customer feedback survey (40-50 words)	<ul style="list-style-type: none">• Identify what questions you will ask• Consider how the questions are asked to ensure you get an honest response• Decide what software or system you will use to create the survey• Invite all staff members to review the questions and provide feedback
Steps to send customer feedback survey (20-30 words)	<ul style="list-style-type: none">• Automate the survey using SurveyMonkey to be sent the day after their purchase date and 3 months after purchase date• Send survey link to customers via email
Steps to analyse feedback received (30-35 words)	<ul style="list-style-type: none">• View all feedback weekly• Update the satisfaction rating in the KPI report to incorporate the latest feedback• Analyse the open-ended responses• Analyse the product quality responses• Analyse the delivery/pick up experience
Steps to action feedback (10-20 words)	<ul style="list-style-type: none">• Address any red flag responses immediately• Follow-up with customers for more details

Task 4

Access [SurveyMonkey](#) and create a free account. You can register with your email address, or you can sign up with any of the following accounts:

- Microsoft
- Facebook
- LinkedIn
- Google
- Apple.

As part of the company's Customer Feedback Management System, create a survey to measure Eco Aussie Office Desks' customer satisfaction by clicking on 'Create Survey', then on 'Start from scratch'. Name your survey 'Eco Aussie Office Desks Feedback', select 'Customer Feedback' as survey category, then choose

'Classic' as survey format and click on 'Create Survey'. For more information, consult the learning to learn how to create a survey.

Set up the survey with the following instructions and options:

- Page 1: Add the following instruction to 'Page title':

Read the following statements and from the provided options select whether you agree or disagree:

- Add the following questions and select 'Multiple Choice':

Q1. Eco Aussie Office Desks' products are good quality products.

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree

Q2. Eco Aussie Office Desks' products are good value for money.

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree

Q3. I am satisfied with the delivery options.

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree

Q4. Delivery time was reasonable and as promised. (If opted for online delivery)

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree
- N/A - used 'Click and Collect'

- Add 'New page'.

- Add the following question and select 'Single Textbox':

Q5. Please provide any general feedback on your experience with Eco Aussie Office Desks.

- Generate a web link to share your survey by clicking on 'Collecting Responses'.
- Provide a link to your survey in the box below.

Instructions to the assessor: Student must create a survey on SurveyMonkey by following the instructions and questions provided.

[Copy your survey's link here]

Student must provide a link to the survey created on Survey Monkey. An example of the survey can be accessed for the assessor's reference under the title 'Eco Aussie Office Desks Feedback Survey Example'.

Task 5

Vanessa has setup an inventory management system to control stock levels, manage inventory expenditure and shrinkage due to damaged product. You can view this system by opening the [Eco Aussie Office Desks Inventory Management Template Excel spreadsheet](#).

Use the table below to draft the step-by-step procedure to accompany the spreadsheet. Main steps have been provided for you. This step-by-step procedure will outline how to use the system for all employees' reference, and it will also clarify roles and responsibilities for each step. The procedure will be communicated to all staff once agreed by everyone.

Instructions to the assessor: Students must provide details to each step of the procedure provided for controlling stock levels, managing inventory expenditure and shrinkage due to damaged product, along the lines of the sample answer.

Sample answer is provided below.

PROCEDURE TO CONTROL STOCK LEVELS, MANAGE INVENTORY EXPENDITURE AND SHRINKAGE		
Steps	Detail (5-45 words)	Responsible person for this step (2-4 words)
1. Product is received at the warehouse	<ul style="list-style-type: none">Product codes and quantities are added to the spreadsheet	Warehouse manager
2. Product is inspected and stored	<ul style="list-style-type: none">Any damaged product on consignment is identified and sent back to the manufacturerAny damaged product is identified and communicated to business owner with a recommendation to list at reduced priceProduct is stored first in first out to maintain quality	Warehouse manager and business owner
3. Inventory levels are monitored	<ul style="list-style-type: none">Each product type is physically counted and added to spreadsheet weekly	Warehouse manager

4. Customer orders are placed, and product removed from stock	<ul style="list-style-type: none"> Customer purchase desks via online store Desks are then delivered directly to the customer or ready for Click and Collect 	Warehouse manager
5. Inventory levels are updated	<ul style="list-style-type: none"> Stock levels are physically counted at the end of each week and report sent to administration officer 	Warehouse manager and administration officer
6. Stock reordered	<ul style="list-style-type: none"> Spreadsheet will flag when stock needs to be reordered List of stock requiring reordering is sent to the business owner for approval and cost control 	Warehouse manager and business owner

Task 6

Vanessa received an email from the warehouse managers to report on current stock level and damaged items. Access the ['Eco Aussie Office Desks Inventory Management' Excel spreadsheet](#) and update it with the following information:

- Rose Gum desk, 3 drawers: 15 desks in stock, 1 damaged
- Cypruss Pine desk: 10 desks in stock, 2 damaged
- Ironbark: 30 desks in stock
- French Oak: 10 desks in stock
- Brushbox Timber: 15 desks in stock, 5 damaged
- Swan River Mahogany: 2 desks in stock, 1 damaged
- Myrtle Beech: 10 desks in stock
- Spotted Gum: 5 desks in stock, 1 damaged
- Alpine Ash: 10 desks in stock

When the spreadsheet is updated, save the document using the following naming convention: **BSBESB406_Project 1_ Eco Aussie Office Desks Inventory Management_yourname_yymmdd.**

Based on the inventory management spreadsheet, which desk types are due for re-order?

[Approximate word count: 15-20 words]

Instructions to the assessor: Students must update the Eco Aussie Office Desks Inventory Management spreadsheet with the given information, then based on the numbers, they need to identify the desk types that are due for re-order. Completed spreadsheet can be found in the Eco Aussie Office Desks Inventory Management spreadsheet - Assessor guide.

Sample answers for desk types due for re-ordering is provided below:

[Type your response here]

Students must be able to identify that the following desk types are due for re-ordering: Cypruss Pine desk, French Oak, Swan River Mahogany, Myrtle Beech, Spotted Gum, Alpine Ash.

Task 7

You have a regular client, who wants to order 2 pieces of 3 drawers Rose Gum desks and one French Oak desk. The client needs the Rose Gum desk (unit price \$315) delivered during working hours to Burleigh (12 Cox's Road, Qld 4822), any day between Monday to Thursday, while the French Oak desks (unit price \$415) will be collected by the client's contractors on a Saturday morning from Robina (175 Wiley Road, Qld 4226).

The client requested undamaged items. As in the previous order the client had a damaged item, 5% discount is awarded to the client on the total purchase. Note, delivery to client is \$70.

Using the template below, write an email to manufacturer and complete a purchase order as an attachment by using the purchase order template below.

[Approximate word count: 80-90 words]

Instructions to the assessor: Student must draft an email to manufacturer to accompany the order done by completing the Purchase form.

Sample answers are provided below:

From:	vanessa@ecoaussie.com.au
To:	admin@naturefurniture.com.au
Subject:	New order to Qld
Attachment:	Purchase order .docx

[Write your email here]

In the email, student must specify the quantity and type of product, delivery address and instructions regarding delivery time, item costs, the discount applied and any client requirements.

This an example of the email:

Good morning,

This is to place an order of the following:

- 2 pieces of 3 drawers Rose Gum desks (unit price \$315, to be delivered between Monday-Thursday, working hours, Burleigh, 12 Cox's Road, Qld 4822) and
- one French Oak desk (unit price \$415, to be delivered to the warehouse in Robina 175 Wiley Road, Qld 4226).


Note, a 5% discount is awarded on total purchase price [i.e., \$52.25].

Please make sure that none of the items have any faults.

See detailed purchase order completed.

Kindest regards,
Vanessa

Student must complete the Purchase Order below with the information provided in the question:

ATTACHMENT					
 <p>ECO AUSSIE OFFICE DESKS</p>	<h2 style="margin: 0;">PURCHASE ORDER</h2> <p>Date: [add date] Purchase Order No: Ord1202 Customer No: 1125</p>				
<p>VENDOR INFORMATION: Nature Furniture 23 Central Street Melbourne, VIC</p>	<p>Instructions provided in email (see special instructions)</p>			<p>Ship to: Instructions provided in email (see special instructions)</p>	
ITEM No.	Description	Qty	Unit Price	Total	
1	3 drawers Rose Gum desk	2	\$315	\$630	
2	French Oak desk	1	\$415	\$415	
				SUBTOTAL	
				DISCOUNT	
				GST	
			SHIPPING/HANDLING		
				TOTAL	
COMMENT OR SEPCIAL INSTRUCTIONS (20-30 words)					
<ul style="list-style-type: none"> Rose Gum desks to be delivered between Monday-Thursday, working hours, Burleigh, 12 Cox's Road, Qld 4822) French Oak desk (unit price, to be delivered to the warehouse in Robina 175 Wiley Road, Qld 4226). 					
<p>Thank you</p>					

Task 8

As part of quality control procedure and to ensure that clients receive the best product and service possible, Vanessa has created a quality control checklist that will be completed by vendor and/or warehouse managers once a product is ready for delivery.

Using the template below, write an email to vendor and warehouse managers to request they follow quality procedures to ensure product and customer requirements are met and they complete the quality checklist once a product is ready for delivery. The checklists will be collected by COB every Friday and sent to Vanessa for review and for records.

In your email outline the **six (6)** parts of the checklist, explain the importance of quality assurance, how the quality procedure is applied in practice and what does AQL mentioned in the checklist mean and how the checklist should be completed.

[Approximate word count: 200–300 words]

Instructions to the assessor: Student must write an email to vendor and warehouse managers to request they follow quality procedures to ensure product and customer requirements are met and they complete the quality checklist once a product is ready for delivery. In the email students must explain the importance of quality assurance, how the quality procedure is applied in practice and what does AQL mentioned in the checklist mean and how the checklist should be completed.

Sample answers are provided below:

From:	vanessa@ecoaussie.com.au
To:	admin@naturefurniture.com.au WarehouseNSW@ecoaussie.com.au WarehouseQLD@ecoaussie.com.au
Subject:	Quality assurance
Attachment:	Quality assurance checklist .docx
[Write your email here]	
<p>In the email, student must clearly instruct vendor and warehouse managers that they must complete the quality checklist once a product is ready for delivery. The checklists will be collected and sent to Vanessa by COB every Friday for review and for records.</p> <p>This an example of the email:</p> <p>Good morning,</p> <p>As part of quality control procedure and to ensure that clients receive the best product and service possible, I have created a quality control checklist that you must complete from now on once a product is ready for delivery. Please make sure you follow quality procedures to guarantee product and customer requirements are met. and they complete the quality checklist once a product is ready for delivery. The checklists will be collected and sent to Vanessa by COB every Friday for review and for records.</p> <p>The checklist has 6 parts:</p> <ul style="list-style-type: none"> • Generic information regarding order number and customer • Quality level - the product either meets AS requirements or has an acceptable quality limit (AQL). If the product has critical or major faults, order on hold, to follow up with higher management. Minor faults must be discussed with management and/or with the customer. 	

- Item check - item markings and labelling must include material, country of origin, care instructions, size, supplier code / trademark. Shipper carton must include an undamaged carton at a size that fits the product, clear and legible label present, including weight, manual handling instructions, supplier code / trademark, legible delivery address.
- Customer service - Notification must be sent out regularly: acknowledgement of order sent 24 hours from receiving the order, item dispatched (within 5 business days from order acknowledgement), item shipped – tracking information provided (within 48 hours from dispatch), survey (within 24 hours from item being delivered).
- Any comments/ suggestions for improvements
- Person who authorised delivery.

See the quality assurance checklist attached. If you have questions, don't hesitate to contact me for further clarifications,

Kindest regards,
Vanessa

ATTACHMENT

QUALITY ASSURANCE CHECKLIST

Part 1: Generic Information

Date: [add date]

Order number		Customer (name and delivery address)	
Customer Description			

Part 2: Quality level

AS/NZS 4442:2018	<input type="checkbox"/> Met	<input type="checkbox"/> Not met [complete AQL level]	
AQL Level	Critical*	Major*	Minor**
Default	0	2.5	4.0
Customer specific			

*Order on hold, to follow up with higher management

**To discuss with management and/or customer

Part 3: Item check

No.	Checkpoint	Checkpoint Instruction	Tolerance	Result	Comment
1.	Item markings / Labelling	a) As per client-given specs b) Clear and legible label and care label present, including: • Material • Country of origin • Care Instructions • Size • Supplier Code / Trademark	Confirms		
2.	Shipper carton details	• Undamaged carton at a size that fits the product			

		<ul style="list-style-type: none"> • Clear and legible label present, including: <ul style="list-style-type: none"> ○ Weight ○ Manual handling instructions ○ Supplier Code / Trademark ○ Legible delivery address 			
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Part 4: Customer service

Has the customer been notified of the following:		Comments
<ul style="list-style-type: none"> • Acknowledgement of order (within 24 hours from receiving the order) 	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<ul style="list-style-type: none"> • Item dispatched, ready for delivery (within 24 business days from order acknowledgement) 	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<ul style="list-style-type: none"> • Item shipped – tracking information provided (within 48 hours from dispatch) 	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<ul style="list-style-type: none"> • Survey sent (within 24 hours from item being delivered) 	<input type="checkbox"/> Yes <input type="checkbox"/> No	

Part 5: Any comments / Suggestions for improvements

Part 6: Delivery authorised

Delivery authorised by: (name and position)	
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Task 9

Access the Eco Aussie Office Desks Operational Plan used for Part A of this assessment and review the information regarding human resource requirements.

As part of the management of staff requirements, based on the information provided in the operational plan, create a staff plan in the following table outlining staffing requirements, hours and rates of pay for each staff member, in accordance with the provided budgetary constraints.

Note, that the company is committed to offer above the award wages. The company hires warehouse managers under the Storage Services and Wholesale Award [MA000084] – wholesale employee level 4, while the administrative officer is employed under the Clerks - Private Sector Award [MA000002] [MA000049] – level 4.

To check the minimum pay rate for the individual awards, you can use the Fair Work's [Pay Calculator](#).

Instructions to the assessor: Students must complete the table below to create the 'Staff plan', with information based on the operational plan, outlining staffing requirements, hours and rates of pay for each staff member, in accordance with budgetary constraints and award information. Students' responses must align with sample answers.

Sample answers are provided below:

STAFF PLAN				
	Key Requirements (30-75words)	Weekly Hours	Rates of Pay (excluding 10.5% superannuation)	Maximum Budget Allocated
Administrative Officer	<p>Part-time (Monday, Wednesday, Friday)</p> <ul style="list-style-type: none"> Provide administrative support to all staff, preparing correspondence and arranging meetings Maintain purchase order register and client records Supplier management ensuring all documentation, reviews and access are approved Processing of purchase orders and invoices 	7 hours per day x 3 days per week = 21 hours per week	<p>Based on the award, students must calculate a pay rate over the minimum pay rate of \$27.47, but no more than \$41 to align with budget.</p> <p>For example: \$30 per hour + superannuation</p>	\$50,000 p.a.
Warehouse Manager – NSW	<p>Full-time (Monday – Friday)</p> <ul style="list-style-type: none"> Maintain a clean, organized and safe work environment for personnel to work in while ensuring all safety and environmental regulations are followed. Support programs for safety, fire prevention, disaster recovery and so forth. Ensures the development of specific plans for inclusion in these programs. Opening and closing of the warehouse Electric forklift operation and charging Loading and unloading trucks Receiving finished goods Printing labels for consignments Inventory management 	37.5 hours per week	<p>Based on the award, students must calculate a pay rate over the minimum pay rate of \$24.90, but no more than \$34,42 to align with budget.</p> <p>For example: \$32,2 per hour + superannuation</p>	\$75,000 p.a.

	<ul style="list-style-type: none"> • Providing exceptional customer service to 'Click and Collect' customers 			
Warehouse Manager - QLD	<p>Full-time [Monday – Friday + Saturday morning 2.5 hours]</p> <ul style="list-style-type: none"> • Maintain a clean, organized and safe work environment for personnel to work in while ensuring all safety and environmental regulations are followed. Support programs for safety, fire prevention, disaster recovery and so forth. Ensures the development of specific plans for inclusion in these programs. • Opening and closing of the warehouse • Electric forklift operation and charging • Loading and unloading trucks • Receiving finished goods • Printing labels for consignments • Inventory management • Providing exceptional customer service to 'Click and Collect' customers 	40 hours per week	<p>Based on the award, students must calculate a pay rate over the minimum pay rate of \$24.90, with Saturday rate: \$37.35, but no more than \$30 to align with budget.</p> <p>For example: \$30 per hour + superannuation</p>	\$70,000 p.a.

Assessment checklist:

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

Part A: Develop Operational Plan		
Task 1	Complete the 'Business Goals and Objectives' section of the operational plan	<input type="checkbox"/>
Task 2	Complete the 'Risk Assessment Plan' section of the operational plan	<input type="checkbox"/>
Task 3	Write an email to implement WHS mitigation strategies	<input type="checkbox"/>
Task 4	Draft a risk management procedure in the table provided	<input type="checkbox"/>
Task 5	Complete the 'Key Performance Indicators' section of the operational plan and save the operational plan in pdf with the given naming convention, ready for submission	<input type="checkbox"/>
Task 6	Complete the table based on the review of the 'Return and Refund Policy and Procedure'	<input type="checkbox"/>
Part B: Implement Strategies and Procedures		
Task 1	Complete the table to create a business performance management procedure	<input type="checkbox"/>
Task 2	Complete the table and evaluate data to see whether the company reached target sale in the first quarter and	<input type="checkbox"/>
Task 3	Complete the table to create a customer feedback management system	<input type="checkbox"/>
Task 4	Create a SurveyMonkey survey to measure customer satisfaction and provide link	<input type="checkbox"/>
Task 5	Complete the table to create a procedure to control stock levels, manage inventory expenditure and shrinkage	<input type="checkbox"/>
Task 6	Update the Eco Aussie Office Desks Inventory Management Excel spreadsheet with the provided information, save the spreadsheet with the given naming convention and identify items due for re-order in the answer box	<input type="checkbox"/>
Task 7	Write an email with attachment to manufacturer to place an order	<input type="checkbox"/>
Task 8	Write an email to vendor and warehouse managers to apply quality procedures	<input type="checkbox"/>
Task 9	Complete the table to create staff plan	<input type="checkbox"/>

Congratulations, you have reached the end of Assessment 2!

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