



BSBLDR601

ASSESSOR GUIDE

Lead and manage organisational change

Assessment 1 of 2

Project

Assessment Instructions

Task overview

BSBLDR601 Lead and manage organisational change requires you to develop and implement a change management plan to lead and manage organisational change.

Assessment task 1 requires you to develop a change management strategy; in assessment task 2, you will implement, evaluate and review the change management plan.

Assessment task 1 is divided into two (2) parts:

- Part A – Develop a change management project plan (project)
- Part B – Participate in a change management plan meeting (observation)

Read the case study and complete each part.

Additional resources and supporting documents

To complete this assessment, you will need:

- Access to learning resource
- Access to a computer, internet and word
- Access to a business plan, policies and procedures is available via the CBSA website
- Access to CBSA strategic plan and e-mail template (provided in the assessment)

Task instructions [for the student] Part A: Develop a change management strategy

Case study: You work as Adrian Russo at CBSA. Gavin Stead, Managing Director, has sent you the following e-mail and attachments.

To begin this part, read the following e-mail and its attachment, then complete the tasks that follow:



To: Adrian Russo [adrian.russo@cbsa.com.au]
From: Gavin Stead [gavin.stead@cbsa.com.au]
Date/time: Monday 11:29 a.m.
Subject: Strategic Changes
Attachment: Strategic Plan.docx

Good morning Adrian,

I have an important task that I would like you to undertake. Recently the CBSA board released its strategic objectives for the year, and I have attached the strategic plan to this e-mail. You should also review the organisation's BD001 Business Plan. While profit has kept stable over the last few years, it is hoped that the new strategies will increase profitability. The need to relocate to less expensive premises (saving \$30,000 per annum) and increase recruitment to cope with the expected new business are major operational changes required by the organisation. These operational changes must occur so the organisation can remain viable in an ever-increasing competitive market. It is anticipated that while there will be some cost savings in making the change, there will also be costs involved, including:

- Adding new staff members – anticipated cost is \$300,000
- Upskilling existing staff – \$100,000
- Consulting with experts – \$50,000
- Communication throughout change with key stakeholders – \$60,000
- Office relocation – \$60,000

I am expecting that overall we will save additional revenue of \$100,000 and increase brand awareness of \$50,000. If you could look at the cost benefit analysis to make sure it is positive.

I want you to manage these changes in a professional manner using a change management process.

Develop a **Change Management Plan** to identify and prioritise operational changes. Please e-mail the plan to me for approval.

I also need you to develop a training plan. I'm worried about the culture of staff accepting and contributing to change processes. Team Leaders are having trouble leading change. Please recommend training for staff and Team Leaders around change management. The training plan needs to include recommended sessions, length, delivery mode and resources.

The reporting protocols for this project require you to seek my approval before the change management strategy is communicated to staff, and I must approve any resources for the project. Please confirm your understanding of the reporting requirements.

Kind Regards,

Gavin Stead

Managing Director

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222



ATTACHMENT BELOW:

- *Strategic Plan.docx*

<i>STRATEGIC PLAN</i>
<p>Mission statement: 'Helping businesses to help themselves.'</p> <p>Vision statement: 'To become Australia's largest business advocate.'</p> <p>Core values</p> <p>Our commitment is to:</p> <ul style="list-style-type: none">▪ Implement innovation and excellence.▪ Provide ways to help the customer grow, so they are successful▪ Empower and inspire our customers▪ Behave honestly with respect for all individuals▪ Act professionally with our customers and each other▪ Continually pursue new knowledge and share this openly with others <p>Strategic plan 20XX</p> <p>Strategic objectives for this year include:</p> <ul style="list-style-type: none">▪ Acquiring five new clients per month▪ Maintain 90% retention rate for our existing customers▪ Grow our business financially by 25%▪ Implement three new services for our clients▪ Increase workforce and introduce work efficiencies in line with new services and expected growth

Steps

You must plan for change by completing the following steps.

All tasks must be well written, using language and structure suitable for the audience (Managing Director) to clearly communicate the project objectives, requirements, activities, and recommendations.

Based on the e-mail and attachment, complete the following steps.

1. Read the following documents:
 - a. E-mail from Gavin Stead
 - b. Strategic plan outlining the organisational objectives
 - c. Policies and procedures available from the CBSA website.
2. Complete the following steps to develop a **change management project plan**. Use the change management project plan template provided below to document the plan.
 - a. Complete the **template overview section** to identify the required change, benefits, the change management plan and process and to provide an overview of the current situation of CBSA. [Approximate word count: 20-50 words]

- b. Review the **existing policies/practices** at CBSA used to guide organisational change. Complete the **analysis – policy review** section in the template to:
- Identify and explain three current policies that guide organisational change and
 - Identify if changes are required to organisational policies/practices to meet strategic and operational objectives.
- [Approximate word count: 150-300 words]
- c. Complete the **analysis – external environment** to analyse the external environment relevant to CBSA objectives. For example, consider events/trends that impact strategic and operational objectives, trends in B2B service offerings, as well as competitors and possibly strategic partnerships. Your analysis should reflect a PEST analysis approach, reviewing political, economic, social, and technological factors.
- [Approximate word count: 50-100 words]
- d. List the **potential barriers to change** proposed changes and possible strategies to overcome or address them.
- [Approximate word count: 20-50 words]
- e. **readiness for change and cost-benefit analysis** section to identify if the change is required as a result of performance gaps, business opportunities, threats or management decisions. Provide a detailed explanation of how an organisation can check their readiness for change and how organisational behaviour can impact change.
- [Approximate word count: 50-100 words]
- f. **strategies for embedding change** into the organisation
- [Approximate word count: 20-50 words]
- g. **prioritisation** of the recommended changes, including your reasoning
- [Approximate word count: 20-50 words]

CHANGE MANAGEMENT PROJECT PLAN	
Overview	
<u>Name of change/project</u>	
<u>Change management</u> <<Provide an overview of the change management plan and process for communicating and implementing change>>	
<u>Current situation</u> <<An overview of the current situation facing CBSA>> <<Benefits of change>>	

CHANGE MANAGEMENT PROJECT PLAN

Analysis

Policy review

<<Refer to the CBSA website. Identify and explain three existing policies that guide or relate to organisational change>>

<<Provide a review of existing policies/practices at CBSA against strategic and operational objectives to identify change requirements>>

External environment

<<Provide a PEST analysis (reviewing political, economic, social and technological factors)>>
A minimum of one trend must be identified.

External environment

Review trends in B2B service offerings, as well as competitors/trends and possibly strategic partnerships that impact strategic and operational objectives.
Provide a website link to your research.
A minimum of one trend must be identified.

Potential barriers to change and risk management plan

Risk management plan:

<<Complete the risk management table to list the major risks identified. You must include a minimum of two risks. Use the risk assessment legend to establish the likelihood and consequences of the change. Identify risk treatment/control measures to mitigate the risk.>>

Likelihood	Consequences				
	Insignificant <i>Risk is easily mitigated by normal day to day process</i>	Minor <i>Delays up to 10% of Schedule Additional cost up to 10% of Budget</i>	Moderate <i>Delays up to 30% of Schedule Additional cost up to 30% of Budget</i>	Major <i>Delays up to 50% of Schedule Additional cost up to 50% of Budget</i>	Catastrophic <i>Project abandoned</i>
Certain >90% chance	High	High	Extreme	Extreme	Extreme
Likely 50% - 90% chance	Moderate	High	High	Extreme	Extreme
Moderate 10% - 50% chance	Low	Moderate	High	Extreme	Extreme
Unlikely 3% - 10% chance	Low	Low	Moderate	High	Extreme
Rare <3% chance	Low	Low	Moderate	High	High

CHANGE MANAGEMENT PROJECT PLAN

Risk	Likelihood	Severity	Treatment/control methods

Readiness for change
 <<Provide details about how the organisation can check their readiness for change. This should include an examination of how organisational behaviour can impact change.>>

Cost-benefit analysis of the change
 <<Provide a cost-benefit analysis of the changes.
 CBA = total benefits/total cost>>

Change Implementation

Strategies for embedding change
 <<Provide details about the strategies for embedding the changes>>

Prioritisation of the recommended changes
 <<Provide details about the priority for embedding the changes>>

Implementation strategies including stakeholder consultation

Implementation strategies are shown in the following CBSA action plan and communication plan

3. Use the following **CBSA action plan template** to identify the tasks, order of priority, resources requirements and timeframes. In this task, you must demonstrate the use of problem-solving skills and innovative thinking. The list of activities/tasks must also include actions required to respond to barriers to change according to the risk management plan and organisational objectives.
 [Approximate word count: 1-5 words per cell]

Activities/tasks	Person responsible	Resources	Timeframe
<i>Add more lines as needed</i>			

4. Complete the following **CBSA communication plan** to identify strategies to inform stakeholders of the change, promote the benefits of the change and reduce the likelihood of negative response/adverse outcomes.
 [Approximate word count: 1-10 words per cell]

Stakeholder or audience <i>"Who needs to know?"</i>	Objective, purpose of needs and interest <i>What is the message that needs to be communicated?</i>	Communication method	Date or frequency	Responsibility <i>Who needs to deliver the message?</i>
<i>Add more lines as needed</i>				

5. Develop a **CBSA Training plan** to identify the training required, who requires the training, expected outcomes and an estimation of the training costs.
 [Approximate word count: 1-5 words per cell]

Name of session	Learning outcomes	Length of session	Audience	Delivery mode	Resources required
<i>Add more lines as needed</i>					

6. Complete the following CBSA e-mail template to write an **e-mail** to Gavin Stead, Managing Director to:
- seek feedback and approval of the change management plan
 - confirm change management opportunities and processes
 - advise of your agreement about the reporting protocols.

In the body of the e-mail:

- request Gavin to approve the change
- state that the change management plan is attached to the e-mail.
- In your own words, confirm your understanding of the reporting protocols for this project.
[Approximate word count: 20-50 words]

To:	
From:	
Date/time:	
Subject	

Salutation

E-mail body

Student name

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

www.cbsa.com.au



Submission instructions

Submit your assessment via the LMS.

Assessor instructions Part A: Develop a change management strategy

Purpose of task

This part is designed to ensure students can read and interpret information to identify change management requirements.

Guidance to the assessor about the task

There is no submission due date for this task. Students may submit this task when they are ready.

The following are benchmark answers for the following steps.

2. Change management project plan

CHANGE MANAGEMENT PROJECT PLAN	
Overview	
<u>Name of change/project</u>	<i>Name of project</i>
<u>Change management</u> <<Provide an overview of the change management plan and process for communicating and implementing change>>	<i>The student's words will vary but their response must include information on the process or cycle of change management. This may be presented by a graphic/diagram and an explanation.</i> <i>There are many processes for change, but the response must refer to a plan. The learner guide stages include:</i> <i>Stage 1: Assess the need for change</i> <i>Stage 2: Plan the change</i> <i>Stage 3: Implement the change</i> <i>Stage 4: Review, monitor and embed the change.</i>
<u>Current situation</u> <<An overview of the current situation facing CBSA>> <<Benefits of change>>	<i>The student must identify the need for change and the situation that has brought about the change – the need to increase profitability and relocate to cheaper premises.</i> <i>This will result in cost savings to cheaper premises and enable the organisation to increase staff.</i>
Analysis	
<u>Policy review</u> <<Refer to the CBSA website. Identify and explain three existing policies that guide or relate to organisational change. >>	<i>The student must identify and explain a minimum of three policies from the CBSA website. Any of the following three policies can be identified with an explanation:</i> <ul style="list-style-type: none"> <i>HR Policies – It ensures that all operations are done in a consistent manner and enables employers to track employee performance. Having clear objectives and guidelines set out in the policy helps employees understand exactly what is expected of them, allowing for a smoother workflow and increased efficiency within the company.</i> <i>Recruitment Policies – Recruitment policies are used to help an organisation to manage its workforce to achieve organisational goals. It is used to identify the right people for specific roles</i>

	<p>allowing the business to meet their business objectives. Recruitment policies cover how employees are recruited, transferred and redeployed.</p> <ul style="list-style-type: none"> • <i>Training and Development Policies – A Training and development policy is a guideline about how the organisational provides training and professional development opportunities to staff. Training initiatives can help an organisation keep up with industry changes and trends, while providing employees with the skills they need to be successful in their roles. A policy ensures that all employees receive appropriate levels of training and remain current on new developments within their fields.</i> • <i>Communication Policies – A communication policy outlines the methods used to communicate between employees and stakeholders, as well as clarifying the delegated authority of each individual in the organisation. It also serves to ensure that everyone’s expectations are met when it comes to staying informed and up-to-date with changes within the company. A clear communication policy should define who has access to certain information, how it is being shared and what types of messages need approval before being sent out. A good communication policy will include instructions on how staff can provide feedback or suggest changes that could improve performance within the business. This helps create an open environment where change is encouraged and welcomed, leading to greater efficiency and effectiveness in operations</i> • <i>Change Management Policy – A change management policy is a document that outlines the procedures and processes used when planning, implementing, and reviewing changes to an organization or company. It helps to ensure that any changes are carefully evaluated and managed in order to minimize disruption to daily operations. This document should clearly explain the process for identifying areas of improvement, how change will be managed, who will be involved in the decision-making process, and how success or failure of a change will be measured.</i>
<p><<Provide a review of existing policies/practices at CBSA against strategic and operational objectives to identify change requirements>></p>	<p><i>The student must review the policies and practices and provide details on the change requirements. The organisation has a robust policy and procedures framework and accepts reasonable suggestions such as no changes required or appropriate minor changes.</i></p>
<p><u>External environment</u> <<Provide a PEST analysis (reviewing political, economic, social and technological factors)>></p>	<p><i>Student’s words will vary and their response must cover PEST.</i></p> <ul style="list-style-type: none"> • <i>Political – political environment is generally good for businesses; no real regulations for this industry except around privacy</i>

	<ul style="list-style-type: none"> • <i>Economic – Intense competition; overall economic conditions are improving/declining, as well as growth/reduction in household income</i> • <i>Social – business becoming more tech-savvy with social media channels, blogs, online content</i> • <i>Technological – Increased use of technology in online environments</i>
<p><u>External environment</u> Review trends in B2B service offerings, as well as competitors/trends and possibly strategic partnerships that impact strategic and operational objectives. Provide a website link to your research. A minimum of one trend must be identified.</p>	<p><i>The student must identify at least one of the following trends for B2B service providers:</i></p> <ul style="list-style-type: none"> – <i>Channel spend on e-mail, content and event marketing</i> – <i>Video marketing</i> – <i>Marketing automation</i> – <i>Artificial intelligence (AI)</i> – <i>Account-based marketing (ABM)</i> – <i>Social media marketing</i> <p><i>Some example URL's with trending data:</i> <i>11 Exciting b2b trends for 2020</i></p> <p>https://www.brafton.com.au/blog/strategy/11-exciting-b2b-marketing-trends-you-need-to-know-for-2018/</p> <p>https://www.lyfemarketing.com/blog/b2b-marketing-trends/</p>
<p><u>Potential barriers to change</u> <<Provide a minimum of one potential barrier to the changes >></p>	<p><i>There are a range of barriers to change. Students response will vary and can include any of the following: fear of the unknown, loss of control, threat of losing a position or status, threat of increased workload, becoming obsolete, cost.</i></p>
<p><u>Potential barriers to change and risk management plan</u></p> <p>Risk management plan:</p> <p><<Complete the risk management table to list the major risks identified. You must include a minimum of two risks. Use the risk assessment legend to establish the likelihood and consequences of the change. Identify risk treatment/control measures to mitigate the risk.</p>	

Likelihood	Consequences				
	Insignificant <i>Risk is easily mitigated by normal day to day process</i>	Minor <i>Delays up to 10% of Schedule Additional cost up to 10% of Budget</i>	Moderate <i>Delays up to 30% of Schedule Additional cost up to 30% of Budget</i>	Major <i>Delays up to 50% of Schedule Additional cost up to 50% of Budget</i>	Catastrophic <i>Project abandoned</i>
Certain >90% chance	High	High	Extreme	Extreme	Extreme
Likely 50% - 90% chance	Moderate	High	High	Extreme	Extreme
Moderate 10% - 50% chance	Low	Moderate	High	Extreme	Extreme
Unlikely 3% - 10% chance	Low	Low	Moderate	High	Extreme
Rare <3% chance	Low	Low	Moderate	High	High

Risk management plan			
Risk	Likelihood	Severity	Treatment/control methods
<p><i>The student must provide a list of barriers and strategies to address or overcome them. The response must refer to at least two of the following: lack of employee involvement, ineffective communication strategies, a bad culture shift planning, unknown current state, organisation complexity, no clear process or plan, lack of leadership, lack of risk management, progress is not measured, lack of training, successes not recognised. All fields must be completed.</i></p>			
<u>Readiness for change</u>			<i>The student is required to provide details on how an organisation can check their readiness, which must</i>

<p><<Provide details about how the organisation can check their readiness for change. This should include an examination of how organisational behaviour can impact change.>></p>	<p><i>include examining the people readiness (have people been notified and involved, have the priorities been set by the management team, identifying training needs via a training needs analysis in time) and checking the system readiness (are the auditing tools and measurement tools ready, have the policies and procedures been updated, is the software and hardware available). The student must also include information on how behaviour can impact change. The response must refer to at least one of the following: self-interest, fear of the unknown, fear of loss or failure, disruption, poor communication and culture, lack of trust, coercion</i></p>
<p><u>Cost-benefit analysis of the change</u> <<Provide a cost-benefit analysis of the changes. CBA = total benefits/total cost>></p>	<p><i>Adding new staff members – anticipated cost is \$300,000</i> <i>Upskilling existing staff – \$100,000</i> <i>Consulting with experts – \$50,000</i> <i>Communication throughout change with key stakeholders – \$60,000</i> <i>Office relocation – \$60,000</i> <i>Total cost = \$570,000</i></p> <p><i>Benefits</i> <i>Additional revenue for 12 month period \$100,000</i> <i>Increase in brand awareness \$50,000</i> <i>Total benefits = \$150,000</i> <i>CBA = 570,000/150,000=3.8</i></p>
<p>Change Implementation</p>	
<p><u>Strategies for embedding change</u> <<Provide details about the strategies for embedding the changes>></p>	<p><i>The student must provide strategies for embedding change into an organisation, referring to Kotter's 8-Stage Process to Creating Major Change or Organisational Development theories.</i></p>
<p><u>Prioritisation of the recommended changes</u> <<Provide details about the priority for embedding the changes>></p>	<p><i>The student must provide a priority order of change and the reasoning behind the order. The reason may refer to quick wins, less cost, more cost reduction, retention of staff, etc.</i></p>
<p><u>Implementation strategies including stakeholder consultation</u></p>	<p>Implementation strategies are shown in the following CBSA action plan and communication plan</p>

3. CBSA action plan template.

The student must list activities/tasks includes actions required to respond to barriers to change according to risk management plan and organisational objectives. All fields must be completed. At the diploma level, students will develop complex plans, innovative ideas and problem solving skills so actions may be varied. An example is provided below.

Activities/tasks	Person responsible	Resources	Timeframe
Some will come from the risk management plan here - major areas to be covered include:			
Communication and input of staff	Person responsible must be identified	Resources can be varied	Time must be identified
Communication and input of Stakeholders			
Relocation			
Recruitment			
Arranging communications and feedback opportunities			
Contingency planning for relocation delays			
<i>Add more lines as needed</i>			

4. CBSA communication plan

The student must identify strategies to inform stakeholders of the change, promote the benefits of the change and reduce the likelihood of negative response/adverse outcomes.

All fields must be completed. At the diploma level, students will develop complex plans and innovative ideas so actions may be varied. An example is provided below.

Stakeholder or audience <i>"Who needs to know?"</i>	Objective, purpose of needs and interest <i>What is the message that needs to be communicated?</i>	Communication method	Date or frequency	Responsibility <i>Who needs to deliver the message?</i>
Staff	Details of relocation When Where	Email Flyers Social Media	4 weeks prior to relocation date	Communications Section/Manager

	Open for business/shut down times	Webpage		
Staff	As above	Email	Weekly	HR and Communications Rosters/Working hours may be affected etc Needs to be legal and within staff capability and responsibilities etc.
External Stakeholders: Suppliers Customers/clients	Details of relocation When Where Open for business/shut down times	Email Flyers Social Media Webpage	4 weeks prior to relocation date	Communications Section/Manager
<i>Add more lines as needed</i>				

5. CBSA Training plan

The student must identify the training required, who requires the training, expected outcomes and an estimation of the training costs or resources.

All fields must be completed. At the diploma level, students will develop complex plans and innovative ideas so actions may be varied. Training must address change management for staff and lead change for Team Leaders. An example is provided below.

Name of session	Learning outcomes	Length of session	Audience	Delivery mode	Resources required
Change at work	Understand change processes Contribute to change	3 hours	All staff	Face-to-face	\$1,000 external facilitator
Leading change	Understand change process Lead change	3 hours	Team Leaders	Face-to-face	\$1,000 external facilitator
<i>Add more lines as needed</i>					

6. CBSA e-mail template to e-mail to Gavin Stead, Managing Director.

In the e-mail, the student must:

- seek feedback and approval of the change management plan
- confirm change management opportunities and processes
- advise of your agreement about the reporting protocols.

In the body of the e-mail:

- request Gavin to approve the change
- state that the change management plan is attached to the e-mail.
- In your own words, confirm your understanding of the reporting protocols for this project.

A benchmark example is provided below:

To:	Gavin Stead
From:	Student name (or Adrian Russo)
Date/time:	Date/time
Subject	The subject must be relevant to project instructions. e.g. Change management project plan

Salutation [Salutation such as Dear Gavin, Hello Gavin]

E-mail body

E-mail body must:

- State the change management plan is attached to the e-mail
- Request Gavin to approve the change
- Confirm the student's understanding of the reporting protocols. This must be in the student's own words and will cover the reporting requirements identified in the e-mail covering 'The reporting protocols for this project require you to seek my approval before the change management strategy is communicated to staff. I must approve any resources or changes to the project'.

For example,

Please find attached the change management plan for your review and approval.

My understanding of the reporting requirements are:

- ask for approval of the change management strategy before it is communicated to staff.
- Gavin Stead must approve resources and changes required for the project.

Student name

Student name

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

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Review all evidence and mark using the assessment checklist and assessment marking criteria.

Marking criteria Part A: Develop a change management strategy

Assessment submission checklist

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

Part A: Develop a change management strategy		
1.	Change management project plan	<input type="checkbox"/>
2.	CBSA action plan	
3.	CBSA communication plan	
4.	CBSA training plan	<input type="checkbox"/>
5.	CBSA e-mail to Gavin Stead	

Assessment marking criteria

Assessor instructions: All sections must be completed. Refer to the template for sample answers and benchmarks.

The evidence submitted demonstrates that the student has satisfactorily [S] covered the following criteria, or the evidence is not yet satisfactory [NYS] and requires resubmission.

MARKING CRITERIA		Satisfactory [S]	Not Yet Satisfactory [NYS]
Step 2	The student submitted a change management project , and all fields have been completed. Refer to Guidance to assessor benchmark. Answers align with the benchmark.	<input type="checkbox"/> S	<input type="checkbox"/> NYS
3	The student submitted a CBSA action plan , and all fields have been completed. The student demonstrated the use of problem-solving skills and innovative thinking List of activities/tasks includes actions required to respond to barriers to change according to risk management plan and organisational objectives. Refer to Guidance to assessor benchmark. Answers align with the benchmark.	<input type="checkbox"/> S	<input type="checkbox"/> NYS
4	The student submitted a CBSA communication plan , and all fields have been completed. Refer to Guidance to assessor benchmark. Answers align with the benchmark.	<input type="checkbox"/> S	<input type="checkbox"/> NYS
5	The student submitted CBSA training plan , and all fields have been completed. Refer to Guidance to assessor benchmark. Answers align with the benchmark.	<input type="checkbox"/> S	<input type="checkbox"/> NYS

Steps 2 to 5	All tasks (1 to 4 above) are well written, using language and structure suitable for the audience (Managing Director) to clearly communicate the project objectives, requirements, activities, and recommendations.	<input type="checkbox"/> S	<input type="checkbox"/> NYS
6	<p>The student submitted the CBSA e-mail to Gavin Stead, and all fields have been completed.</p> <p>The student:</p> <ul style="list-style-type: none"> • stated the change management plan is attached to the e-mail • requested Gavin to approve the change • confirmed their understanding of the reporting protocols <p>Refer to Guidance to assessor benchmark. Answers align with the benchmark.</p>	<input type="checkbox"/> S	<input type="checkbox"/> NYS

Task instructions (for the student) Part B: Participate in a change management plan meeting (role plays/observations)

You have received the following e-mail from Gain Stead.



To: Adrian Russo (adrian.russo@cbsa.com.au)

From: Gavin Stead (gavin.stead@cbsa.com.au)

Date/time: Friday 8:22 a.m.

Subject: Change Management Plan Meeting

Good morning Adrian,

7. I have reviewed the Change Management Plan you have submitted and would like to meet to discuss this. I have also invited a Change Management expert to the meeting to get an expert opinion. Can you lead the meeting, providing an overview of your Change Management Plan? We will discuss its contents, assign resources and make any appropriate changes prior to approval.

Kind Regards,

Gavin Stead

Managing Director

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

www.cbsa.com.au



You will participate in a role-play to seek feedback and approval of your plan.

You will play the role of Adrian, and you will need two volunteers to role-play as Gavin Stead and a Change Management Expert.

The purpose of the meeting is to review your research and change management plan and seek feedback and approval for the next phase – the implementation of the plan.

You must complete Assessment Task 1 and gain approval of your plan before you commence Assessment Task 2.

In assessment Task 2, you will modify your plan based on the feedback given.

During the meeting, your Assessor will be looking to see that you can:

- verbally summarise the contents of the Change Management Plan and the prioritisation of the changes
- discuss and seek information using appropriate structure and language for the particular audience
- use inclusive and collaborative techniques to seek feedback, negotiate and consult with the meeting attendees
- use active listening and questioning techniques to ensure meeting attendees' understanding

- display new and innovative ideas through the exploration of lateral thinking in the discussion
- discuss and seek feedback about the priority of the change objectives and alignment with the organisational objectives
- discuss the outline and development of the communication plan or the training plan with stakeholders
- seek approval for the plan, the allocation of resources and reporting protocols.

Steps

- a. Participate in the meeting with Gavin Stead [student/peer] and change management expert [student/peer]

Role play instructions

The role-play/meeting must include your chosen two participants, must not exceed ten minutes, and must address all elements of the Observation Checklist below.

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

1. Peer/s who you are already working with in the industry your qualification relates to.
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.

If you are unable to find a participant/s to play the role of the other team member/s, contact your assessor via the Discussion Forum, who will discuss options for pairing up with another student/s to complete this task.

Option 1: Peer/s participant

Should you complete this task with your Peer/s, you must fully brief all participant/s, providing them with the context of the role play/meeting, a role outline to play and a copy of the observation checklist so that they can prepare for the recording.

Peer/s will need to state their name and job title at the start of the recording to inform consent.

Option 2: Fellow student/s participant

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

Student/s will need to state their name and that they are a student (as their job title) at the start of the recording to inform consent.

Recording instructions

Your role play must be recorded with all participant/s 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 participant/s 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 job title to inform consent.

"This session/presentation is being recorded for assessment purposes for my course. This session will be recorded and submitted through my course online learning platform to my assessor for grading. All participant/s in this session indicate their consent to be included in this recording by stating their name and job title."

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

Include this recording as part of your assessment submission.

Before the role-play meeting

To prepare for this meeting, please provide the participant role-playing Gavin and change management expert information regarding the scenario to allow them to prepare and contribute to the meeting.

You will also need to familiarise yourself with your role as Adrian to lead and discuss the change management plan conversation.

During the role-play meeting, [Adrian] must:

- Introduce yourself and the purpose of the meeting
- discuss the outline and development of the change management plan or the training plan with stakeholders
- Share a list of identified major change requirements and opportunities – these should align with the strategic objectives and the focus of the business.
- Approval of the change management process that they have outlined
- Approval of reporting protocols

During the meeting, the student must display the following communication skills:

- verbalise a summary of the contents of the Change Management Plan and the prioritisation of the changes.
- discuss and seek information using appropriate structure and language for the particular audience
- use inclusive and collaborative techniques to seek feedback, negotiate and consult with the meeting attendees
- use active listening and questioning techniques to ensure meeting attendees' understanding
- seek approval for the plan, the allocation of resources and reporting protocols

You must discuss a minimum of **four components**, and you must be able to describe the purpose and importance of each component.

During the meeting [Gavin and the Change Management Expert] must:

- Introduce yourself to the group and your role in this meeting
- Check their sources of information to ensure that they have conducted enough research to inform their plan.
- Discuss how organisational behaviour and the external environment can impact change strategies.

- Ask Adrian to explain a number of the components of the change management plan, which may include:
 - the implementation plans
 - communication and training
 - risk assessment
 - cost-benefit analysis
 - organisational readiness
 - barriers to change

You must ask about a minimum of **four components**, and the student (Adrian) must be able to describe the purpose and importance of each component.

- b. Based on the feedback, modify the **change management plan** and save it as V2 (version 2).

Submission instructions

Submit a recording of your role play/observation via the LMS.

Submit the modified change management plan.

Assessor instructions Part B: Participate in a change management plan meeting

There is no submission due date for this task. Students may submit this task when they are ready.

Review all evidence and mark using the assessment checklist and assessment marking criteria.

Purpose of task

This part is designed to ensure that the student can undertake a meeting regarding their Change Management Plan with stakeholders.

Guidance to assessor about the task

The student will play the role of Adrian for this assessment. Two [2] additional students should play the role of Gavin and the change management expert. The group size must be no less than two stakeholders. The students should discuss any changes they want to implement, including providing this information to the change management expert so they can contribute to the meeting.

During the meeting, the student must display the following communication skills:

- verbalise a summary of the contents of the Change Management Plan and the prioritisation of the changes.
- discuss and seek information using appropriate structure and language for the particular audience
- use inclusive and collaborative techniques to seek feedback, negotiate and consult with the meeting attendees
- use active listening and questioning techniques to ensure meeting attendee understanding
- discuss the outline and development of the communication plan or the training plan with stakeholders
- seek approval for the plan, the allocation of resources and reporting protocols

The student must submit a modified Change Management Plan based on the changes discussed and agreed upon at the meeting.

There is no submission due date for this task.

Review all evidence and mark using the assessment checklist and marking criteria listed below.

Marking criteria Part B: Participate in a change management plan meeting

Assessment checklist

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

Part B: Participate in a change management plan meeting		
1.	Role play video evidence – change management plan meeting with assessor and change management volunteer not exceeding 10 minutes	<input type="checkbox"/>
2.	Updated change management plan	<input type="checkbox"/>

Observation checklist

The assessor observed the student skills and satisfactorily [S] covered the following criteria or not yet satisfactory [NYS] and requires re-assessment.

MARKING CRITERIA / OBSERVATION CHECKLIST (To be completed by the Assessor when they watch the video or observe the assessment in real-time as they conduct the assessment)		Satisfactory [S]	Not Yet Satisfactory [NYS]
1.	The student consulted with the assessor and change management [volunteer] to confirm the change management plan. During the meeting, the student:		
	<ul style="list-style-type: none"> The student states the purpose of the presentation is to persuade the audience to their point of view or take on their ideas etc. 	<input type="checkbox"/>	<input type="checkbox"/>
	<ul style="list-style-type: none"> verbally summarise the contents of the Change Management Plan and the prioritisation of the changes. 	<input type="checkbox"/>	<input type="checkbox"/>
	<ul style="list-style-type: none"> discuss and seek information using appropriate structure and language for the particular audience 	<input type="checkbox"/>	<input type="checkbox"/>
	<ul style="list-style-type: none"> use inclusive and collaborative techniques to seek feedback, negotiate and consult with the meeting attendees 	<input type="checkbox"/>	<input type="checkbox"/>
	<ul style="list-style-type: none"> use active listening and questioning techniques to ensure meeting attendee understanding 	<input type="checkbox"/>	<input type="checkbox"/>
	<ul style="list-style-type: none"> display new and innovative ideas through the exploration of lateral thinking in the discussion 	<input type="checkbox"/>	<input type="checkbox"/>
	<ul style="list-style-type: none"> discuss and seek feedback about the priority of the change objectives and alignment with the organisational objectives 	<input type="checkbox"/>	<input type="checkbox"/>
	<ul style="list-style-type: none"> discuss the outline and development of the communication plan or the training plan with stakeholders 	<input type="checkbox"/>	<input type="checkbox"/>
	<ul style="list-style-type: none"> seek approval for the plan, the allocation of resources and reporting protocols. 	<input type="checkbox"/>	<input type="checkbox"/>

Assessment marking criteria

Assessor instructions: All sections must be completed. Refer to the template for sample answers and benchmarks.

The evidence submitted demonstrates that the student has satisfactorily [S] covered the following criteria, or the evidence is not yet satisfactory [NYS] and requires resubmission.

MARKING CRITERIA		Satisfactory [S]	Not Yet Satisfactory [NYS]
1.	The student submitted an updated change management plan [v2] and included: <ul style="list-style-type: none">• Changes identified as a result of the role-play activity	<input type="checkbox"/>	<input type="checkbox"/>

Congratulations, you have reached the end of Assessment 1

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