



BSBTEC404

# USE DIGITAL TECHNOLOGIES TO COLLABORATE IN A WORK ENVIRONMENT

## ASSESSOR GUIDE

### Assessment 2 of 2

#### Case Study

Version 1.4 October 2023

## Assessment Instructions

### Task overview

This assessment is divided into four (4) tasks. Read each question/instruction carefully before attempting each task.

### Additional resources and supporting documents:

To complete this assessment, you will need:

- Ace Finance Technology, Collaboration and Communication Policy and Procedure
- Ace Finance Corporate Marketing Plan
- Ace Finances Policies and Procedures
- Access to:
  - o PowerPoint
  - o Google Forms [Google Forms: Online Form Creator | Google Workspace](#) or
  - o Microsoft Forms [Microsoft Forms | Surveys, Polls, and Quizzes](#)

## Assessment Information

### Submission

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

All questions must be answered 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 - email



Hi there,

Ace Finance intends to increase its regional market share by attracting and retaining clients who want a more holistic finance and accounting service that includes training and professional development.

The executive team have conducted a strategic review. We need you to identify and incorporate collaborative digital technologies to commence online training workshops with clients. The business currently uses Microsoft Outlook and Skype to collaborate. This has been a problem, as this limits the opportunity to collaborate and communicate effectively between staff and clients.

You will be required to determine which technologies would be best to effectively support the business in its new venture of online training and ensure all staff are fully equipped to utilize these technologies to their maximum capacity.

Prior to conducting client training, you will need to ensure, through the following four (4) tasks, you will:

- Collect information and review existing programs used at Ace Finance.
- Research and identify other programs/technologies.
- Prepare a business case to get approval for the new program/technology.
- Put together a plan to roll out the new program/technology.
- Communicate and promote the plan to Ace Finance staff (Following Ace Technology, Collaboration and Communication Policy and Procedure).
- Follow the plan and roll out the new tech, ensuring to follow Ace Finance policies and procedures.
- Organize training for the Ace Finance team.



Warm regards,  
*Andrew* | Manager  
[andrew@ace.finance](mailto:andrew@ace.finance)

## Task 1 – Review current technologies

Review *Ace Finance Marketing Plan* along with the *Technology, Collaboration and Communication Policy and Procedure*. Conduct a SWOT analysis using the supplied template.

Complete this task based on your review of the following, against organisational strategies and objectives:

1. Current collaborative ways of working (include 2 in your response)
2. Performance of current collaboration tools

### Assessor Marking Guide

Each analysis will vary depending on the technology selected. However, it must include:

- Strengths – A list or description of what is working well.
- Weakness - A list or description of what is not working as well as it could.
- Opportunities – A list or description of what needs to be improved or changed.
- Threats – An explanation of any threats to the customer or technological threats.

The following table lists topics that students would be expected to include in their answers:

### SWOT Analysis

Strengths (minimum 4 examples for each collaborative way of working)	Weaknesses (minimum 3 examples for each collaborative way of working)
<p>The following are acceptable responses:</p> <p><b>Skype</b></p> <ul style="list-style-type: none"> <li>• User-friendly interface</li> <li>• Many free features</li> <li>• Don't need to download the program</li> <li>• Don't need to create an account</li> <li>• Group collaboration</li> <li>• can be used to text message, chat, video call or voice call</li> <li>• can exchange both video and text-based messages online and exchange documents online</li> <li>• Subscription model</li> </ul> <p><b>Outlook</b></p> <ul style="list-style-type: none"> <li>• Sits within Office suite</li> <li>• Linked to other apps in the 365 suite</li> <li>• Emails can be grouped into conversations</li> <li>• High storage space</li> <li>• Easy access across various devices</li> <li>• Scans for viruses and unsafe link</li> </ul>	<p>The following are acceptable responses:</p> <p><b>Skype</b></p> <ul style="list-style-type: none"> <li>• different permissions/duration of functions between paid and free accounts.</li> <li>• software sits outside Microsoft Office Suite.</li> <li>• requires additional plan and access information to access.</li> <li>• Security issues - Many use it for fraudulent transactions and underhand businesses</li> </ul> <p><b>Outlook</b></p> <ul style="list-style-type: none"> <li>• Cost associated as part of 365 suite</li> <li>• Doesn't allow for video calling</li> <li>• Emails can be lost in junk mail</li> <li>• Lack of integration for related functions such as calendar and contacts</li> </ul>
Opportunities (minimum 2 examples for each collaborative way of working)	Threats (minimum 3 examples for each collaborative way of working)

<p>The following are acceptable responses:</p> <p><b>Skype</b></p> <ul style="list-style-type: none"> <li>• HD video calling</li> <li>• call recording and live subtitles</li> <li>• easily share presentations through screen sharing</li> <li>• smart messaging - all in one platform</li> </ul> <p><b>Outlook</b></p> <ul style="list-style-type: none"> <li>• Integration options with other Office 365 such as SharePoint and Teams</li> <li>• Email and calendar in the same place providing the opportunity for scheduling and communicating the schedule at one time</li> </ul>	<p>The following are acceptable responses:</p> <p><b>Skype</b></p> <ul style="list-style-type: none"> <li>• loss of contact details in the transfer of technologies</li> <li>• Data loss, as current data, cannot be moved to the new system</li> <li>• Instant messaging applications pose serious security threats to users. There needs to be a strong protection feature which can be costly.</li> </ul> <p><b>Outlook</b></p> <ul style="list-style-type: none"> <li>• Unreliable as emails can go to spam or junk folder</li> <li>• Data loss, as current data, cannot be moved to the new system</li> <li>• loss of contact details in the transfer of technologies</li> </ul>
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## Task 2 – Identify alternative technologies

### Part A

Research and discuss two (2) alternative technologies, GoToMeeting and ZOOM, that will better support Ace Finance to meet its client’s needs. Identify sources of technical information you can access to help make a decision on which would be the best option.

(Approximate word count 75 – 100 words per alternative technology)

Assessor Marking Guide	
<p>Student’s responses will vary however students must list 2 collaborative technologies and provide details of where they sourced information for each.</p> <p>Sources of information must be credible and relevant to technology. Example:</p>	
Technology 1 - GoToMeeting	Technology 2 - ZOOM
<p><b>Brief overview and main features</b> Source: <a href="https://www.gotomeeting.com/">https://www.gotomeeting.com/</a></p> <p><b>GoToMeeting</b> is a web-hosted service created and marketed by LogMeIn. It is an online meeting, desktop sharing, and video conferencing software package that enables the user to meet with other computer users, customers, clients or colleagues via the Internet in real-time.</p> <p>The main features are:</p> <ul style="list-style-type: none"> <li>• Screen sharing</li> <li>• Conference calling</li> <li>• Mobile calling</li> </ul>	<p><b>Brief overview and main features</b> Source: <a href="https://zoom.us/">https://zoom.us/</a></p> <p><b>Zoom</b> is a videotelephony software program developed by Zoom Video Communications.</p> <p>Zoom consists of:</p> <ul style="list-style-type: none"> <li>• Zoom Chat</li> <li>• Zoom Meetings</li> <li>• Zoom Phone</li> <li>• Zoom Developer Platform APIs &amp; SDKs</li> <li>• Zoom for Home</li> <li>• OnZoom</li> <li>• Zoom App Marketplace</li> </ul>

<ul style="list-style-type: none"> <li>• <i>Virtual Whiteboard</i></li> <li>• <i>Built-In Audio</i></li> <li>• <i>Meeting Scheduler</i></li> <li>• <i>Hand Over Control</i></li> <li>• <i>One-Click Recording</i></li> <li>• <i>Join via Mobile Options</i></li> <li>• <i>Desktop/Application Sharing</i></li> <li>• <i>Personal Meeting Room</i></li> <li>• <i>Meeting recording and transcription</i></li> </ul>	<ul style="list-style-type: none"> <li>• <i>Zoom Webinars</i></li> <li>• <i>Zoom Rooms</i></li> <li>• <i>Zoom for Healthcare</i></li> </ul> <p><i>Features include:</i></p> <ul style="list-style-type: none"> <li>• <i>HD video, audio, collaboration and chat</i></li> <li>• <i>Instant communication across real-time video and phone</i></li> <li>• <i>Expanding traditional schools in the cloud</i></li> <li>• <i>Integrations and bots to use with Zoom</i></li> <li>• <i>People can join a meeting for free but the meeting host has to pay a monthly subscription unless they agree to be restricted to the features of a free plan (like a call no longer than 40 minutes)</i></li> </ul>	
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## Part B

Based on your research, make a formal recommendation for the use of **ZOOM**, to the CEO of Ace Finance. Follow the Ace Finance Style Guide when formatting your business case.

Use the business case template to record your findings and make your recommendations.

### Assessor Marking Guide

Students are required to follow the Ace Finance Style Guide to format their business case.

#### Executive Summary (Approximate word count 125 – 175 words)

*This section must contain a summary of the main points of the business case. This section must cover all the important information covered in the business case and provide sufficient context to your reader. It will include:*

- *The reason for the business case*
- *A mention of the digital technologies currently being used and their limitations*
- *Identifying Zoom as the recommended digital technology*

#### Finance (Approximate word count 125 – 175 words)

*Must include two subsections:*

- *Financial appraisal*
  - *The student will compare the cost of Zoom and other digital technologies*
- *Project/budget risks*
  - *The student needs to identify if there are any financial risks with the move to Zoom*

#### Project Definition (Approximate word count 450 – 550 words)

*This is the largest part of the business case. This section must contain details relevant to the project sponsor, stakeholders, and project team. This section must also answer the why, what, and how questions about the project.*

*Here the business case must:*

- *Identify available digital technologies by accessing relevant sources of information,*
- *Highlight that the student has (or has considered the need to) seek assistance from specialist advisors, where required.*
- *Outline the assessment of existing collaborative work against available and existing digital technologies.*
- *Identify opportunities and priorities for digital technology in collaborative work.*
- *Include details of Ace Finance's objectives, purchasing strategy and market assessment (commercial strategy).*
- *Identify any associated risks.*

*Refer to the Ace Finance Style Guide for further formatting guidance.*

The format of the business case must be set out in the following subsections with the following information in each:

- **Background information**
  - Reason for the project including the problems it attempts to address and opportunities for moving to Zoom.
  - A SWOT analysis could be included but is not essential.
- **Business objective**
  - This will include the aim of the project.
  - What the requirements are to accomplish the implementation of Zoom?
- **Benefits and limitations**
  - This section will discuss how implementing Zoom will improve efficiency, productivity and overall work conditions.
- **Option identification and selection**
  - Outline of other technologies considered and information on each.
- **Scope, Impact and Interdependencies**
  - include detailed information on what needs to be done to move the organization across to Zoom.



- Acknowledgment that this is not a standalone project, and it could affect or be affected by other projects.
- Outline plan
  - include an implementation schedule and timeline for the rollout of Zoom.
- Market assessment
  - include details of the relevance of moving to Zoom in the organisation's current environment.
- Risk assessment
  - include the risks of both staying with the current technology and moving to Zoom.
  - Needs to also include how these risks will be dealt with.
- Project approach
  - an outline of the tasks involved with the implementation of Zoom and how these tasks will be accomplished.
- Purchasing strategy
  - details of the financial requirements of purchasing Zoom.

#### **Project Organisation** (Approximate word count 125 – 175 words)

*Students must describe how the project is set up, including the governance of the project and how progress will be reported.*

- Project governance
  - This will outline the decision-making process, including the hierarchy of levels of decision-making.
- Progress reporting
  - This will include details of how and when project progress updates will be provided to the stakeholders/organisation.

### **Task 3 – Present your findings**

Organise a meeting with the CEO of Ace Finance to present your business case. Use the business case template that you developed in Assessment Task 2A as a guide.

The presentation must include:

- An executive summary
- Financials
- Project
- Project organisation.

In this meeting, you must:

- Communicate effectively using appropriate language, tone and body language
- Outline the key features of your business plan
- Respond appropriately to questions asked by the CEO of Ace Finance
- Make a recommendation and ask for approval to implement your business plan.

#### **Role-play instructions**

The role-play/meeting must include at least number 1 participant, must not exceed 15 minutes in duration and must address all elements of the Observation Checklist below.

In this task, you will participate in a role-play/meeting with one other person playing the role of the CEO of Ace Finance. This person may be resourced using one of the following options:

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

2. A fellow student. 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 to 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 with Swinburne Open Education. 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. Save the recording as 'BSBTEC404 Role-Play\_YourName\_DDMMYYYY'.

Include this recording as part of your assessment submission.

### **Role-play context for the Student presenting business case to CEO**

Ace Finance currently uses Microsoft Outlook and Skype to collaborate. This has been a problem, as it has limited the opportunity for staff and clients to collaborate and communicate effectively.

Ace Finance management has asked the student to:

- determine which technologies would be best to effectively support the business in its new venture of online training
- ensure all staff are fully equipped to utilize these technologies to their maximum capacity.

During the role-play **the student must** present a summary of their business case.

This summary must include:

- An executive summary
- Financials
- Project
- Project organisation

During the role-play, the **student** must address the following topics:

- Background information/reason for business case
  - Current technology used and reasons for moving to Zoom
- Business objective
  - The requirements to accomplish the implementation of Zoom
- Benefits and limitations
  - Limitations of current technology used and the benefits of implementing Zoom
- Market assessment
  - Include details of the relevance of moving to Zoom in the organisation's current environment.
- Financial Appraisal
  - Compare the cost of Zoom and other digital technologies along with any financial risks with the move.
- Risk assessment
  - Include the risks of both staying with the current technology and moving to Zoom
  - also including how these risks will be dealt with.
- Project approach
  - An outline of the tasks involved with the implementation of Zoom and how these tasks will be accomplished.

### **Role-play context for the participant role-playing the CEO of Ace Finance**

To prepare for this meeting, give the following role-play context to the meeting participant. This will allow them to prepare and contribute to the meeting.

#### **Role-play context**

In this role-play, you will assume the role of the CEO of Ace Finance. The student has prepared a business case for introducing a new technology into the workplace. They have been asked to present their plan to you for approval.

Ace Finance currently uses Microsoft Outlook and Skype to collaborate. This has been a problem, as it has limited the opportunity for staff and clients to collaborate and communicate effectively.

Throughout this roleplay, the participant playing the role of the CEO **must** ask the following **three (3)** questions:

- What is your strategy for training and coaching our staff in digital technologies?
- Will Ace Finance need to engage the services of any specialist advisors?
- What are the risks, if any, associated with your strategy?

Some other questions that can be asked to meet the requirements of this task include:

- What is the reason for this business case?
- What is the current collaboration tool used at the workplace, and what are your limitations?
- What collaboration tool are you looking to implement, and what benefits will this bring to the workplace?
- What are the costs of implementing Zoom?
- Are there any associated risks that need to be addressed, and how will these be handled?
- How will the implementation of Zoom be established?

**Please note:** The student who is being assessed will be recording this meeting and submitting the recording for assessment.

Observation Checklist			
The student was observed demonstrating the following during their presentation		Observed Y/N	Assessor Comment
01	<b>Communicated key features of the business plan</b>		
	<ul style="list-style-type: none"> <li>Executive summary</li> </ul>		
	<ul style="list-style-type: none"> <li>Financials</li> </ul>		
	<ul style="list-style-type: none"> <li>Project definition</li> </ul>		
	<ul style="list-style-type: none"> <li>Project organisation</li> </ul>		
02	<b>Communicated effectively with others</b>		
	<ul style="list-style-type: none"> <li>Appropriate language</li> </ul>		
	<ul style="list-style-type: none"> <li>Clearly articulated information</li> </ul>		
	<ul style="list-style-type: none"> <li>Used appropriate tone and body language</li> </ul>		
	<ul style="list-style-type: none"> <li>The student was persuasive</li> </ul>		
03	<b>Listened to comments and feedback</b>		
	<ul style="list-style-type: none"> <li>Responded appropriately to three questions from the CEO of Ace Finance</li> </ul>		
04	<b>Make a recommendation and ask for approval to implement your business plan.</b>		

### Assessor Guide

Each student must present their business case using appropriate verbal language that is clear and professional. They must use formal language appropriate for presenting to the CEO by using correct pronunciation and not using contractions and slang.

This observation checklist is to be completed by the assessor. Mark Yes (Y) if the student demonstrated each of the required outcomes for each stage of the development of the business plan during the role play. And No (N) if the student did not demonstrate each of the required outcomes for each stage of the development of the business plan during the role-play.

Feedback on the student's performance must be added by the assessor.

Observation Checklist			
The student was observed demonstrating the following during their presentation		Observed Y/N	Assessor Comment
01	<b>Communicated key features of the business plan</b>		
	Executive summary <ul style="list-style-type: none"> <li>The reason for the business case</li> <li>A mention of the digital technologies currently being used and their limitations</li> <li>Identifying Zoom as the recommended digital technology</li> </ul>		
	Financials <ul style="list-style-type: none"> <li>Financial appraisal</li> </ul>		

	<ul style="list-style-type: none"> <li>○ The student will compare the cost of Zoom and other digital technologies</li> <li>● Project/budget risks <ul style="list-style-type: none"> <li>○ The student needs to identify if there are any financial risks with the move to Zoom</li> </ul> </li> </ul>		
	<p><b>Project definition</b></p> <ul style="list-style-type: none"> <li>● Background information <ul style="list-style-type: none"> <li>○ Reason for the project including the problems it attempts to address and opportunities for moving to Zoom.</li> <li>○ A SWOT analysis could be included but is not essential.</li> </ul> </li> <li>● Business objective <ul style="list-style-type: none"> <li>○ This will include the aim of the project.</li> <li>○ What the requirements are to accomplish the implementation of Zoom?</li> </ul> </li> <li>● Benefits and limitations <ul style="list-style-type: none"> <li>○ This section will discuss how implementing Zoom will improve efficiency, productivity and overall work conditions.</li> </ul> </li> <li>● Option identification and selection <ul style="list-style-type: none"> <li>○ Outline of other technologies considered and information on each.</li> </ul> </li> <li>● Scope, Impact and Interdependencies <ul style="list-style-type: none"> <li>○ include detailed information on what needs to be done to move the organization across to Zoom.</li> <li>○ Acknowledgment that this is not a standalone project, and it could affect or be affected by other projects.</li> </ul> </li> <li>● Outline plan <ul style="list-style-type: none"> <li>○ include an implementation schedule and timeline for the rollout of Zoom.</li> </ul> </li> <li>● Market assessment <ul style="list-style-type: none"> <li>○ include details of the relevance of moving to Zoom in the organisation's current environment.</li> </ul> </li> <li>● Risk assessment <ul style="list-style-type: none"> <li>○ include the risks of both staying with the current technology and moving to Zoom.</li> <li>○ Needs to also include how these risks will be dealt with.</li> </ul> </li> </ul>		

	<ul style="list-style-type: none"> <li>● <b>Project approach</b> <ul style="list-style-type: none"> <li>○ an outline of the tasks involved with the implementation of Zoom and how these tasks will be accomplished.</li> </ul> </li> <li>● <b>Purchasing Strategy</b> <ul style="list-style-type: none"> <li>○ details of the financial requirements of purchasing Zoom.</li> </ul> </li> </ul>		
	<p>Project organization</p> <ul style="list-style-type: none"> <li>● <b>Project governance</b> <ul style="list-style-type: none"> <li>○ This will outline the decision-making process, including the hierarchy of levels of decision-making.</li> </ul> </li> <li>● <b>Progress reporting</b> <ul style="list-style-type: none"> <li>○ This will include details of how and when project progress updates will be provided to the stakeholders/organisation.</li> </ul> </li> </ul>		
<b>02</b>	<b>Communicated effectively with others</b>		
	<ul style="list-style-type: none"> <li>● <b>Appropriate language</b> For example <ul style="list-style-type: none"> <li>○ Avoid slang, casual language or overly familiar terms</li> <li>○ Be polite and respectful.</li> </ul> </li> </ul>		
	<ul style="list-style-type: none"> <li>● <b>Clearly articulated information</b> For example <ul style="list-style-type: none"> <li>○ Avoid jargon and technical terms unless your audience is familiar with them.</li> <li>○ Keep your sentences and paragraphs short and to the point.</li> <li>○ Use simple, direct language to convey your message.</li> </ul> </li> </ul>		
	<ul style="list-style-type: none"> <li>● <b>Used appropriate tone and body language</b> For example: <ul style="list-style-type: none"> <li>○ tone of voice should be polite, respectful, and professional.</li> <li>○ avoid sounding too passive or too aggressive; aim for a balanced tone.</li> </ul> </li> </ul>		
	<ul style="list-style-type: none"> <li>● <b>The student was persuasive</b> For example: <ul style="list-style-type: none"> <li>○ was clear and concise and outlined the main points.</li> </ul> </li> </ul>		

	<ul style="list-style-type: none"> <li>○ Use a logical structure to present the information</li> <li>○ addressed any concerns</li> <li>○ confidently answered questions.</li> </ul>		
<b>03</b>	<b>Listened to comments and feedback</b>		
	<ul style="list-style-type: none"> <li>• Responded appropriately to three questions from the CEO of Ace Finance</li> </ul> <p>During the role-play, the student must answer these three questions:</p> <ul style="list-style-type: none"> <li>○ What is your strategy for training and coaching our staff in digital technologies?</li> <li>○ Will Ace Finance need to engage the services of any specialist advisors?</li> <li>○ What are the risks if any, associated with your strategy?</li> </ul>		
<b>04</b>	<b>Make a recommendation and ask for approval to implement your business plan.</b>		
	<p>During the role-play the student must make a recommendation and ask for approval to implement the recommendation.</p>		

## Task 4 - Implement digital technologies

### Part A

Your chosen technology has been approved by the Executive Team to roll out within Ace Finance. You are now, therefore, required to implement your chosen digital technology within the business.

Create an implementation plan to introduce and create the new collaborative technology you have selected, in line with the Technology, Collaboration and Communication Policy and Procedure. Your plan should address matters such as the goal of the change, the resources required, an implementation/ training schedule, the assignment of responsibilities and a contingency plan.

<b>Implementation plan</b>
Recommended New Digital Technology (Approximate word count 5-10 words)
Goals (Approximate word count 50-70 words)



Assigned Responsibilities (Approximate word count 65-85 words)
Implementation Training Schedule (Approximate word count 175-200 words)
Required Resources (Approximate word count 100-125 words)
Date of Implementation (Approximate word count 1-10 words)
Contingency Plan (Approximate word count 175-200 words)

### Assessor Marking Guide

Each plan will vary however must address; goals for the change of technology, assigned responsibilities, implementation schedule, a list of required resources, date of implementation and a contingency plan.

A Sample response has been provided below.

<b>Implementation plan</b>
Recommended New Digital Technology (Approximate word count 5-10 words)
My recommended new digital technology is Zoom.
Goals (Approximate word count 50-70 words)

Ace Finance needs to adopt the new digital technology, Zoom, to keep up with modern trends and stay ahead of its competitors. The primary goal of this change is to enhance collaboration among employees, leading to a more productive work environment that benefits both the staff and clients.

#### Assigned Responsibilities (Approximate word count 65-85 words)

The primary responsibility for driving this change lies with our IT team. They have conducted extensive research and training on Zoom and will take on the role of instructors for the rest of the workforce. The expectation for everyone else is to approach this change with an open mind and a readiness to learn. We anticipate proactive learning from all employees as mandated by the Ace Finance Technology, Collaboration, and Communication Policy and Procedure.

#### Implementation Training Schedule (Approximate word count 175-200 words)

We have designed a comprehensive 6-week training program to ensure that our employees fully grasp the new digital technology and can utilise all its features effectively. This training consists of two main components: formal instruction and independent learning.

In the first part, which spans two weeks, employees will be divided into groups of six participants. An IT expert will serve as the instructor, delivering presentations with PowerPoint slides to introduce Zoom and its features. This classroom-style approach will provide a solid foundation for everyone.

Following this initial phase, we will transition to a more independent learning approach. Over the next two weeks, employees will explore various aspects of the technology, including business objectives, benefits, limitations, option identification, scope, impact, interdependencies, project planning, market assessment, risk assessment, project approach, purchasing strategy, project governance, progress reporting, effective communication, and listening skills. This self-directed learning will help deepen their understanding and boost their confidence with the new technology.

The final two weeks of training will involve on-site sessions to further enhance confidence and ensure that everyone is completely comfortable with the digital technology.

#### Required Resources (Approximate word count 100-125 words)

Since this training program spans a considerable duration, we need to allocate resources accordingly. This includes acquiring the latest laptops and computers for the entire team, sending the IT team to relevant training courses to ensure they can effectively teach others, procuring necessary stationery, desks, and chairs for the formal instruction phase, and possibly installing additional power outlets to accommodate an increase in technology devices.

Despite the initial high expenses associated with these investments, they are expected to yield significant long-term benefits. By implementing this new technology, we anticipate a 25% increase in work efficiency, leading to greater productivity and, subsequently, increased revenue. This improved productivity is projected to cover all the costs associated with this change.

Date of Implementation (Approximate word count 1-10 words)

The implementation of Zoom will commence on 16/10/2023.

Contingency Plan (Approximate word count 175-200 words)

While we have high confidence in the reliability of Zoom, and it is widely recognized as one of the most successful communication applications globally, we have also developed a contingency plan to mitigate potential issues during the transition. Although the likelihood of problems arising is low, in the event of a system flaw or an unforeseen planning issue, we are prepared to address and resolve the situation promptly.

To further support our colleagues in adapting to the new technology, we have a plan in place. If any employees struggle to grasp Zoom's features even after our 6-week training program, we will offer one-on-one sessions with IT experts. Additionally, if a more extended training period is necessary, we are open to extending it from the initially planned 6 weeks to 7 or 8 weeks.

In case of any technical difficulties, such as a Zoom application crash or unavailability, our contingency plan includes keeping the old digital technologies on standby for use. Simultaneously, our IT team will work to resolve the issue with Zoom and restore its functionality as quickly as possible.

## Part B

To communicate this with the stakeholders, you are required to prepare two (2) emails.

This information will be delivered to the entire business, including the Executive Team. You must ensure your tone and language is appropriate for this audience and your information is delivered in a detailed and clear manner. Use the email templates below.

The first email must be addressed to your team and outline the details of your implementation plan, including:

- the key features of your selected digital technology
- the time frame allotted for the roll-out
- training plan and schedule
- who will be leading this project
- when and how training will be conducted.

(Approximate word length 350 – 450 words)

The second email should be addressed to the company's external stakeholders and whilst it must include the same information, the tone and language of the email should be adjusted to reflect the external nature of the communication.

(Approximate word length 350 – 450 words)

## Assessor Guide

Each email must include information that aligns with the student's implementation plan and covers each of the above points. The language and presentation of the emails must be appropriate to the audience.

Sample answers have been provided below, listing the points that **must be** covered.

## Email Template 1.

To:	Entire Team
From:	
Subject:	Exciting News: Implementation Plan for Our New Digital Technology
Attachments:	

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Dear [Team Name],

I hope this message finds you all well. We're thrilled to share some exciting news regarding the implementation of our new digital technology. This initiative promises to enhance our efficiency and collaboration, and we want to ensure that everyone is well-informed about the plan.

### Key Features of Our Selected Digital Technology:

The digital technology we've chosen is Zoom, a versatile and reliable platform known for its seamless communication and collaboration capabilities. With Zoom, we can conduct video conferences, webinars, and screen sharing, making it easier for us to collaborate, connect with clients, and improve overall communication within our organization.

### Time Frame for Rollout:

Our rollout plan is scheduled to begin on [Start Date] and will run for a total of [Duration]. This timeframe will allow us to transition smoothly to Zoom without disrupting our daily operations.

### Training Plan and Schedule:

We have designed a comprehensive 6-week training program to ensure that everyone is proficient in using Zoom's features. The training will consist of three phases:

**Formal Instruction (Weeks 1-2):** In this phase, you will be divided into small groups, and our IT experts will provide classroom-style instruction, introducing you to Zoom's basic features.

**Independent Learning (Weeks 3-4):** You'll delve deeper into Zoom, covering topics such as business objectives, benefits, limitations, and effective communication. This phase will encourage self-directed learning and exploration.

**On-Site Training (Weeks 5-6):** The final phase will involve hands-on, on-site sessions to boost confidence and ensure everyone is comfortable using Zoom.

### Project Leadership:

Our IT team, led by [IT Team Leader's Name], will spearhead this project. They have conducted thorough research and preparation to ensure a smooth transition.

### Training Delivery:

Training sessions will be conducted primarily online via Zoom, allowing you to learn and practice directly on the platform you will be using. There will also be opportunities for one-on-one sessions with IT experts for those who require additional support. In case any technical issues arise, we have a contingency plan to ensure minimal disruption.

We are confident that this implementation will bring about positive changes in our work processes and productivity. Your cooperation and enthusiasm in embracing this new technology are highly appreciated.

We will follow up with more detailed instructions closer to the start date. In the meantime, please feel free to reach out if you have any questions or need further information.

Thank you for your commitment to our organisation's growth and success.

Kind regards

Name:  
Ace Finance  
7 Holden Street Camperdown NSW 2482  
Phone 0408 040 810

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## Email Template 2.

To:	External Stakeholder's
From:	
Subject:	Exciting Announcement: Enhancing Collaboration with New Digital Technology
Attachments:	

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Dear [External Stakeholder's Name],

I hope this message finds you well. We are delighted to share some exciting news that will impact our interactions and collaborations with you. As an important external stakeholder, your engagement with our organization is crucial, and we want to keep you informed about our upcoming changes.

### Key Features of Our Selected Digital Technology:

We have chosen to implement Zoom, a renowned digital platform that offers seamless communication and collaboration features. Zoom will enable us to engage more effectively with our partners and clients, facilitating video conferences, webinars, and screen sharing to enhance our communication and collaboration capabilities.

### Time Frame for Rollout:

Our implementation plan is scheduled to commence on 10/10/2023, and we anticipate the transition to last for 8 weeks. We have carefully planned this timeline to ensure minimal disruption to our ongoing engagements and projects with you.

### Training Plan and Schedule:

To ensure a successful transition, we have developed a comprehensive 6-week training program for our internal teams. This program includes the following phases:

Formal Instruction (Weeks 1-2): Our team members will participate in formal instruction sessions led by our IT experts, providing them with a foundational understanding of Zoom.

Independent Learning (Weeks 3-4): During this phase, our employees will explore advanced features, business objectives, communication strategies, and more, fostering a deeper knowledge of the technology.

On-Site Training (Weeks 5-6): The final phase will consist of on-site sessions to boost confidence and ensure our team is fully comfortable using Zoom.

### **Project Leadership:**

Our IT team, under the guidance of [IT Team Leader's Name], is spearheading this project. They have undertaken extensive research and preparations to ensure a seamless transition.

### **Training Delivery:**

Our training sessions will be primarily conducted online via Zoom, allowing our team to become familiar with the platform through hands-on experience. We are committed to minimizing disruptions and providing a smooth transition.

We believe that this implementation will bring about positive changes in our collaboration and communication, ultimately benefiting our partnerships with external stakeholders like you. Your continued support and collaboration are highly valued and instrumental to our mutual success.

As we approach the start date, we will provide more detailed instructions and support. If you have any questions or require additional information at any point, please do not hesitate to reach out to us.

Thank you for your ongoing partnership with us. We look forward to an even more productive and collaborative future together.

Kind regards

Name:  
Ace Finance  
7 Holden Street Camperdown NSW 2482  
Phone 0408 040 810

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### **Part C**

As part of the implementation of your chosen digital technology, you conduct training. To do this effectively, you need to develop a training resource in the form of a PowerPoint presentation or similar (maximum 10 slides, including title page) which outlines the following:

- What is the chosen technology?
- Why it has been selected (i.e., benefits, why they are changing)
- Features of the technology (i.e., does it have a video function, can messages be sent between users, can files be shared, etc.)
- Outline what is to be included in the training session, for example:
  - o How it is expected to be used – aligning with the purpose of the technology

- How will they access the new technology?
- How to use the features such as video call, internal chat function, screen sharing, file sharing, collaborating on documents, how to add additional participants to a chat, how to mute and unmute, how to set up a video call and share a meeting link, including what not to do (if anything).
- Troubleshooting for example, audio and video settings.
- When it will be implemented by the IT team (i.e., they will install it over the upcoming public holiday/over the weekend- less disturbance to current business running).
- Where to go for further information on using digital technologies for collaborating and communicating (i.e., the Technology, Collaboration and Communication Policy and Procedure).

Save the PowerPoint as 'BSBTEC404 PowerPoint\_YourName\_DDMMYYYY'.

### Assessor Marking Guide

*Student responses may vary but must demonstrate the student's ability to:*

- create a training program that is consistent with the business objectives which include:
  - increasing its regional market share
  - attracting and retaining clients who want a more holistic finance and accounting service that includes training and professional development
- communicates the key features of their chosen digital technology.
  - The key features of Zoom include:
    - HD video, audio, collaboration and chat
    - Instant communication across real-time video and phone
    - Expanding traditional schools in the cloud
    - Integrations and bots to use with Zoom
    - People can join a meeting for free but the meeting host has to pay a monthly subscription unless they agree to be restricted to the features of a free plan (like a call no longer than 40 minutes)
- Develop resources appropriate to the identified audience.
  - The presentation will be done in PowerPoint or similar.
  - A copy of training notes could be provided as a reference resource.

### Part D

As part of your research, use either:

Google Forms [Google Forms: Online Form Creator | Google Workspace](#)

or Microsoft Forms [Microsoft Forms | Surveys, Polls, and Quizzes](#)

to create a survey. The survey must assess the pros and cons of communication with stakeholders through Teams, Zoom or similar technology compared to the emails and Skype methods that Ace Finance was previously using.

Use the survey you created to survey 5 people and collate their responses.

Save the collated responses as 'BSBTEC404 Survey\_YourName\_DDMMYYYY' and upload it as part of your assessment.

### Assessor Marking Guide



Responses will vary however must reflect the feedback of 5 people who have used digital technology to collaborate. Feedback collected must include a comparison to emails and Skype. The survey is not limited to but appropriately includes the following examples of pros and cons.

**Pros:**

- ✓ Easier collaboration
- ✓ More productive
- ✓ Create working groups
- ✓ Better for clients
- ✓ Remote access
- ✓ Save time in transport
- ✓ Family-friendly

**Cons:**

- × Costs
- × Learning new technology
- × Technology requirements
- × Limitations on some basic packages
- × No NBN - ADSL speed
- × Fighting with family for bandwidth

**Assessment checklist:**

Candidates must have completed all activities within this assessment before submitting. This includes:

ASSESSMENT CHECKLIST	
Task 1	SWAT analysis
Task 2a	Identify alternative technologies
Task 2b	Business case template
Task 3	Role-play recording
Task 4a	Implementation plan
Task 4b	2 Emails
Task 4c	Training resources in the form of a PowerPoint presentation or similar
Task 4d	Survey

**Congratulations, you have reached the end of this Assessment!**

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