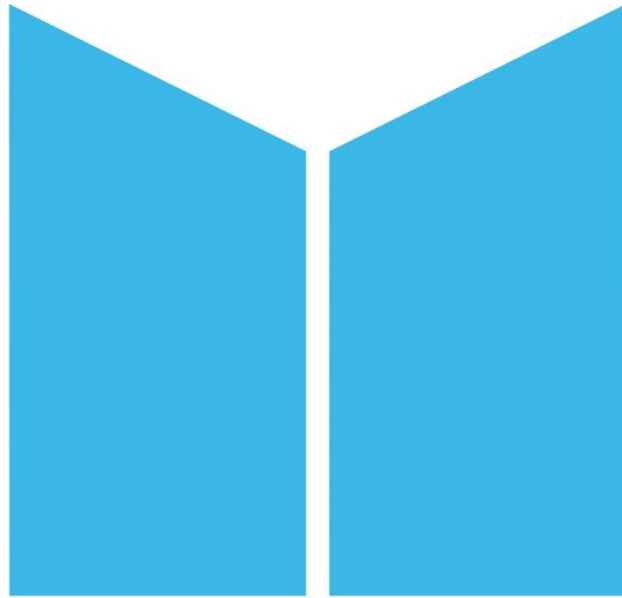




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# MARTIN

## SCHOOL OF BUSINESS AND MARKETING


**1711 – Undertake Project Work**  
**BSBPMG522 Undertake Project Work**




### **ASSESSMENT TASK 1 of 5**



#### **Purpose of Assessment**

The tasks included in this assessment are designed for you to demonstrate that you can effectively evaluate information provided in a range of documents and define a project to an audience.

You will also use the information provided in the documents to create a project plan and discuss this plan with your Assessor to demonstrate your understanding of project procedures.

Task A	Define the project
<p data-bbox="188 309 470 342"><b>Task Instructions</b></p> 	<p data-bbox="555 309 1406 495">The Executive Team at TRI Fitness have discussed and agreed to a strategic goal of achieving operational consistency across all three (3) state operations which aligns to the overall strategic goals published in the <b>TRI Fitness Company File</b>.</p> <p data-bbox="555 506 1406 734">One part of the strategy to achieving national consistency and a uniform national presence is to have a national set of uniforms for all operational (customer service) staff across all states. This is a project that our CEO, Klara Abram, is very passionate about and she will have final approval on the uniform selection.</p> <p data-bbox="555 745 1406 1014">The <b>National Uniform Rollout Brief</b> has been prepared which gives scope details on this project. Each State Manager has nominated their Administration Officer as the local contact to support this project – they will be your primary points of contact for many of the project tasks and will need to keep an account of the hours they spend on project activities.</p> <p data-bbox="555 1025 1406 1294">Tracy Yapp, the COO, will be the Project Leader and will require your assistance with a mix of activities to help her organise and communicate with the state stakeholders. This will include the coordination of tasks to be completed at state level as well as reporting the progress of tasks to Tracy. You may also receive requests to make purchases and process invoices for payments.</p> <p data-bbox="592 1339 1406 1776">i. Using the <b>TRI Fitness Email Template</b>, draft a communication to the State Administration Officers asking for their assistance with this project and outlining the reporting requirements. In your communication you should:</p> <ul data-bbox="608 1541 1366 1776" style="list-style-type: none"> <li>• Outline the purpose of this project</li> <li>• Explain who the stakeholders are</li> <li>• Explain the role you have in this project</li> <li>• Outline how they can assist you</li> <li>• A method to use to record the hours they spend on this project.</li> </ul>

<p><b>TRI Fitness resources required for this task</b></p> 	<ul style="list-style-type: none"> <li>• TRI Fitness Company File</li> <li>• National Uniform Rollout Brief</li> <li>• TRI Fitness Email Template</li> </ul>
<p><b>Resources you need to supply for this task</b></p> 	<ul style="list-style-type: none"> <li>• A personal computer with internet access</li> </ul>
<p><b>Before you submit have you checked the following?</b></p> 	<p><input type="checkbox"/> Your email to State Administration Officers must address all five points requested by Tracy Yap.</p> <p>To receive a satisfactory result you must correctly complete all of the following:</p> <ul style="list-style-type: none"> <li>• Locate and use the correct TRI Fitness documents</li> <li>• Confirm who the stakeholders are and address your email to these people</li> <li>• Introduce the stakeholders to the project and explain its purpose</li> <li>• Clearly explain your own role to the stakeholders</li> <li>• Clearly explain the stakeholders' roles and responsibilities in the project</li> <li>• Create a tool/document to record hours and attach it to the email</li> </ul>

Task B	Project Resources and Reporting
<p><b>Task Instructions</b></p> 	<p>As you undertake the project activities requested it is important that you understand any authority limits you have, particularly around financial authority.</p> <p>The <b>National Uniform Rollout Brief</b> references the <b>TRI Fitness Financial Delegation of Authority Policy</b> which you should source and read so that you are familiar with the authority levels for the project.</p> <p>You have probably also noted that while the project plan contains specific budget allocation for this project, it doesn't provide a method to record or keep track of this; this will need to be developed.</p> <p>To meet this need you must:</p> <ol style="list-style-type: none"> <li>i. Create a resource that can be used by the project team to record all financial activities associated with this project. The resource must:             <ol style="list-style-type: none"> <li>a) Contain an area to capture the budget estimates</li> <li>b) Contain an area to capture the actual amounts spent</li> <li>c) Have calculations to demonstrate the difference between the estimate and actual spend</li> <li>d) Be formatted to print on a single A4 page</li> </ol> </li> <li>ii. Use the <b>TRI Fitness Email Template</b> to send the resource you create in an email to the project manager which contains:             <ul style="list-style-type: none"> <li>• Confirmation of your financial authority level</li> <li>• An outline of the process you will undertake for any spend outside your authority</li> </ul> </li> </ol> <p>Confirmation of the minimum reporting requirements for this project, as stipulated in the <b>National Uniform Rollout Brief</b>.</p>
<p><b>TRI Fitness resources required for this task</b></p> 	<ul style="list-style-type: none"> <li>• TRI Fitness Email Template</li> <li>• National Uniform Rollout Brief</li> <li>• TRI Fitness Financial Delegation of Authority Policy</li> </ul>

**Resources you need to supply for this task**



- A personal computer with internet access



**Before you submit have you checked the following?**





- Your email to State Administration Officers must address all five points requested by Tracy Yap.



To receive a satisfactory result you must correctly complete all of the following:



- Locate and use the correct TRI Fitness documents
- Confirm who the stakeholders are and address your email to these people
- Introduce the stakeholders to the project and explain its purpose
- Clearly explain your own role to the stakeholders
- Clearly explain the stakeholders' roles and responsibilities in the project
- Create a tool/document to record hours and attach it to the email

Task C	Plan the Project
<p><b>Task Instructions</b></p> 	<p>Planning for this project is going to be one of the best resources available to keep the project stakeholders informed of the steps required and progress against timeframes.</p> <p>The <b>National Uniform Rollout Brief</b> has detailed high level tasks relating to this project that the Executive Team have identified as needing to be reflected in the plan. Tracy would like your assistance in creating a project plan that can be used to monitor these events.</p> <ol style="list-style-type: none"> <li>i. Review the <b>National Uniform Rollout Brief</b> and identify a minimum of twelve (12) activities to be included in the project plan, then use the <b>TRI Fitness Project Plan Template</b> to create a plan for this project detailing: <ul style="list-style-type: none"> <li>• The order in which the activities need to take place</li> <li>• How much time will be allocated for each activity</li> <li>• When you will start and end the activities</li> <li>• Who needs to be involved in each activity</li> <li>• Additional notes or explanations to maintain consultation with all stakeholders</li> <li>• A minimum of three (3) risks identified as being associated with the project, with one (1) risk being WHS related</li> <li>• Recommendations on how you manage these risks</li> <li>• The budget allocated for project activities and whether you approve the budget.</li> </ul> </li> <li>ii. Use the <b>TRI Fitness Email Template</b> to send your completed plan and attach your completed project/budget plan to Tracy Yapp. In your email: <ul style="list-style-type: none"> <li>• Identify one area of improvement you would recommend for the project plan template</li> <li>• Request a meeting with Tracey Yap to review your project plan for approval.</li> </ul> </li> </ol>
<p><b>TRI Fitness resources required for this task</b></p> 	<ul style="list-style-type: none"> <li>• TRI Fitness Project Plan Template</li> <li>• TRI Fitness Email Template</li> <li>• National Uniform Rollout Brief</li> </ul>

<p><b>Resources you need to supply for this task</b></p> 	<ul style="list-style-type: none"> <li>• A personal computer with internet access</li> </ul>
<p><b>Before you submit have you checked the following?</b></p> 	<ul style="list-style-type: none"> <li><input type="checkbox"/> You have used the <b>TRI Fitness Project Plan</b> to detail the tasks and activities for this project</li> <li><input type="checkbox"/> You have used the <b>TRI Fitness Email Template</b> to send your completed project plan seeking approval from the COO, Tracey Yap.</li> </ul> <p>To receive a satisfactory result you must correctly complete all of the following:</p> <ul style="list-style-type: none"> <li>• Accessed and reviewed all of the TRI Fitness documents (in particular the National Uniform Rollout Brief) and used this information to make decisions</li> <li>• Created a breakdown of work to be completed (action plan) with start and end dates</li> <li>• Planned when and how you will report on the project</li> <li>• Thought about and planned for tasks which need to be completed before the next can start</li> <li>• Created a budget using your mathematical skills to calculate costs correctly</li> <li>• Made notes which show you have thought about how you will communicate with project stakeholders who are in different states and of different cultural backgrounds</li> <li>• Created a risk management plan and planned for project and WHS risks</li> <li>• Used the TRI Fitness documents as they are laid out and followed the workplace protocols</li> <li>• Communicated professionally for your audience which includes staff whom you report to and are coordinating</li> <li>• (for Tracy only) developed and emailed Tracy ideas for improving the project plans</li> <li>• (for Tracy only) requested a meeting with Tracy to discuss your ideas and the project</li> </ul>



Task D	Review Your Plan
<p><b>Task Instructions</b></p> 	<p>In addition to creating the project plan, Tracy Yap has requested you talk her through your approach to the project during a 30 minute telephone conversation. Tracy has also asked you to review the Project Plan and develop a list of resources you need, which you can explain to her during your meeting.</p> <p>i. Tracy will arrange a time for you to have a discussion about your project plan; this may take place either face to face or by phone. During this discussion you will need to:</p> <ul style="list-style-type: none"> <li>• Clearly explain your understanding of the project purpose</li> <li>• Present the twelve (12) project steps you have identified</li> <li>• Explain why you have place them in this order – provide one example of how this is demonstrated in your plan</li> <li>• Explain the list of resources you (or the team) need for this project</li> <li>• Discuss your ideas for improving the project plan that you sent to Tracy in the last task</li> <li>• Ask Tracy at least two questions to get her input and opinion on how the planning has gone and what should be considered for the next step (implementation)</li> <li>• Be prepared to answer questions about your choices</li> <li>• Listen to and acknowledge feedback provided</li> <li>• Communicate openly and make decisions together.</li> </ul>
<p><b>TRI Fitness resources required for this task</b></p> 	<ul style="list-style-type: none"> <li>• N/A</li> </ul>

<p><b>Resources you need to supply for this task</b></p> 	<ul style="list-style-type: none"> <li>• A personal computer with internet access</li> <li>• A video/audio conferencing tool such as Skype or Zoom</li> </ul>
<p><b>Before you submit have you checked the following?</b></p> 	<p><input type="checkbox"/> Are you ready to discuss your project plan with Tracy?</p> <p>Your assessor will be looking to see that you have:</p> <ul style="list-style-type: none"> <li>• Introduced yourself professionally</li> <li>• Communicated professionally, respectfully, confidently and politely</li> <li>• Showed your knowledge of the TRI Fitness business and project needs (including the National Uniform Rollout Brief and the TRI Fitness Corporate File)</li> <li>• Explained your understanding of the project purpose</li> <li>• Discussed all of your action plan steps and explained the choices you have made (these must be based on your knowledge of Project Management)</li> <li>• Discussed the resources you need, those you have created so far and any you still need to access</li> <li>• Present your ideas to Tracy on how to improve the project plan</li> <li>• Ask and answer questions and show that you are listening during the conversation</li> <li>• Ask for Tracy's feedback and ideas</li> <li>• Work with Tracy to develop solutions (don't expect her to have all the answers)</li> </ul>



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