



BSBPMG540

ASSESSOR GUIDE

# MANAGE PROJECT INTEGRATION

## Assessment 10 of 13

Project and role-play observation



## Assessment Instructions [general]

### Task overview

This unit requires you to implement and manage project integration on at least three occasions.

For each occasion, you will establish, plan, monitor and review a different project (three separate projects):

Occasion 1 is covered by:

- Assessment tasks 2, 3, 4 and 5

Occasion 2 is covered by:

- Assessment tasks 6, 7, 8 and 9

Occasion 3 is covered by:

- Assessment tasks 10, 11 and 12

### This assessment task 10 is divided into two [2] parts:

- Part A – Project Charter (project and observation)
- Part B – Develop and negotiate approval of project management plan (project and assessor observation)

Read the case study and complete each part.

### Additional resources and supporting documents

To complete this assessment, you will need:

- Access to a computer with internet
- Access to Microsoft word or similar
- Access to a meeting area
- CBSA Project Management Policy and procedure (available via the CBSA website)
- Project Charter template (provided in Part A)
- E-mail template (provided in Part B)
- Project Management Plan template (provided in Part B)

## Assessment Information



### Submission

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

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



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

### Reasonable adjustment

Students may request a reasonable adjustment for assessment tasks.

Reasonable adjustment usually involves varying:



- a. the processes for conducting the assessment (e.g. allowing additional time)
- b. 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.

## Task instructions [for the student] Part A: Project Charter

Case study: You work as a Project Manager, Billy Walsh, for Complete Business Solutions Australia (CBSA). You have received the following e-mail from Gavin Stead, Managing Director, about a project to commence in **March 2023**.



To: Billy.walsh@cbsa.com.au  
From: gavin.stead@cbsa.com.au  
Date/time: Monday 10.05 am, 7 March 2023  
Subject: Smart Travel Luggage and Co (STL)  
Attachment: Project Charter Template.docx

Good morning Billy,

As you know, CBSA can now offer Project Management Support to small businesses as needed. We have a new client wanting this service from us, and I would like to put you in charge as the Project Manager.

The Client is: **Smart Travel Luggage and Co (STL)**

This small company focuses on delivering their clients specific types of luggage—designed to withstand high impact, protected from any form of data breach technology and with the highest security parameters in place within the various forms of luggage.

The company, whilst small, has major contracts with multiple government agencies, including Defence and Police services. In particular, their items are used for evidence security during national or international travel. Their designs include covert options or logos and identification as requested by their clients.

The Product is: **STL Tracking Tag**

In the past year, they have been developing a new item that will work in conjunction with their specialised forms of luggage. The item is the STL Tracking Tag, a small circular disk that will be secured within the luggage in a particular area of its design to enable the owner to track the luggage at all times.

The Tag works with the STL Tracking Application on any smart device, computer or laptop.

This item has been designed as an add-on item to all of their current luggage items available.

The STL Tracking Tag has undergone all testing and is now approved to launch.

CBSA's role is the Project management of the launch of this new product.

We have been contracted to assist due to the small size of their company and the limited staff resources they have within their team with this area of skills.

As this will be considered a large project under our policy, you will have the following team members and reporting requirements:

You have three **staff members** to assist you throughout the project.

- Kerry Adams – administration and personal assistant
- Matthew Price – Event Co-ordinator CBSA
- Stacey Robinson – Liaison and contact from Smart Travel Luggage concerning details, contacts and specifics from STL

There will also be a Steering Group for this project, and that will consist of:

- Myself representing CBSA
- Paul Thompson, the CEO of Smart Travel Luggage and Co
- Margaret Page, Product Co-Ordinator from Smart Travel Luggage and Co

- Leah Wright, Marketing Manager from Smart Travel Luggage and Co

The details of the launch that we have so far include:

<b>Date:</b>	Saturday, 6 May 2023
<b>Time:</b>	<b>1830 (6:30 pm) – 2130 (9:30 pm) – 3 hours</b>
<b>Estimated number of attendees:</b>	200-300
<b>Media Coverage:</b>	Yes – print, radio and news outlets
<b>Catering:</b>	Light food and drinks to be supplied
<b>Parking:</b>	Preferable included with the location
<b>Attendee identification required:</b>	Yes
<b>Seating:</b>	Only for official presentations cover 100 and required special needs of attendees
<b>Stall areas:</b>	Yes, for current luggage items Larger area focused on the STL Tracking Tag and demonstrations
<b>Entertainment:</b>	No
<b>Security:</b>	Yes – high-level officials and security-cleared clients will be in attendance
<b>Equipment:</b>	To be advised
<b>Meeting rooms:</b>	If possible, for larger contract clients to discuss needs
<b>Allocated budget:</b>	<b>\$100, 000</b> <b>[NOT inclusive of salaries of CBSA staff—will be invoiced separately to client]</b>

You will liaise directly with Stacey Robinson, who will be on the Project Team and Margaret Page, as needed

Your first meeting has been arranged for Monday 14 March at 2 pm in the conference room. All Project Team and Steering Group members will be present at this meeting.

There, you will obtain further details to commence the draft Project Charter.

Kind Regards,

Gavin Stead

Managing Director

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

[www.cbsa.com.au](http://www.cbsa.com.au)



### Attachment to e-mail:

- Project Charter Template.docx (separate attachment)

### Steps

Based on the e-mail, complete the following tasks.

1. Prepare a **draft Project Charter**:

- Review the contents of the e-mail from the CEO, Gavin Stead
- Locate and review the *CBSA Project Management Policy and Procedure* [available via the CBSA website]
- Open the attachment **BSBPMG540\_Ass No 10\_CBSA Project Charter Template** to develop a **draft Project Charter** based on the information provided for the CBSA Small Business Conference.
- Save the draft charter as Draft Project Charter.

2. **Participate in a meeting with the CEO** [your assessor will play the role of Gavin Stead, CEO]

To complete this step, you must have completed step 1 draft project charter. The role-play meeting will include your Assessor acting in the role of Gavin Stead, CEO and must not exceed 20 minutes in duration and address all elements of the Observation Checklist below. Your Assessor will advise of the date on which the meeting will be held.

During the meeting, you must:

- Present and discuss your draft Project Charter. You need to provide a clear rationale for every aspect of the Charter to gain the support and approval of the CEO for the proposed project scope.
- Discuss, negotiate and seek clarification about project objectives, outcomes and benefits.

Your assessor in the CEO role will propose a different viewpoint to that outlined in your Project Charter. You will be required to demonstrate your negotiation skills to achieve a win-win outcome.

Your assessor will also be looking to see that you can demonstrate communication and teamwork skills, including:

- speak clearly and concisely when sharing and seeking information
- ask questions to identify the required information
- use active listening techniques to elicit information and confirm understanding
- collaborate and cooperate with others to achieve shared goals
- negotiate with others to achieve outcomes.

3. **Update/revise Project Charter**

After the meeting, make any adjustments or revisions to the Project Charter based on the agreements made during the meeting.

Save the document as *Final Project Charter*.

Submit the revised Project Charter via the LMS for approval by the Project Sponsor.

**Submission instructions**

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

## Assessor instructions Part A: Project Charter

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 the student can establish a project and develop and negotiate a Project Charter.

### Guidance to assessor about the task

Use the following as a guide to ensure that the student successfully completes the tasks for this assessment part.

1. Prepare a draft Project Charter

Project Charter	
Project Sponsor	Smart Travel Luggage and Co (STL)
Project Name:	STL Product Launch
Project Manager:	Billy Walsh

**Background** [Word guidance: 20 to 30 words]  
<<Explain why the project is being undertaken and describe the opportunity or problem that the project is to address. Include an explanation of the relationship between the project and broader organisational strategies and goals.>>  
Student's words will vary but their response must include the following background information:  
Arrange, set up and complete the Product Launch Event as outlined.  
CBSA assisting small business with project management for the client Smart Travel Luggage and Co (STL)

**Project objectives** [Word guidance: 15 to 30 words]  
<<Document specific and measurable objectives for the project.>>  
Students words will vary but their response must include a minimum of:  
1. Meet timelines set by the client  
2. Meet the budget set by the client  
3. Meet set expectations of the product launch event as outlined by the client  
Additional information must be included from the client information established in the meeting/role play:  
**Example:** can be more detailed based on the role/play information provided.

**Project Benefits** [Word guidance: 20 to 30 words]  
<<Define the benefits the project will bring to the organisation and stakeholders.>>  
Students must summarise the information provided and consider the benefits this will bring to CBSA.  
For example:  
1. Client satisfaction  
2. Well organisation and professional launch event for client

### 3. Boost reputation in a new area of business for CBSA

#### Project Deliverables

<<What outcomes will the project deliver? Include any products, services or documentation that will be delivered at the close of the project.>> [Word guidance: 10 to 50 words]

Students must summarise the information provided and outline the key deliverables.

Can be directly from Milestones in Roleplay – student may add more information

- Source location for the launch event
- Book location for the launch event
- Source and book materials/staff for the launch event
- Source and book equipment for the launch event
- Source and prepare for identity checks for the launch event
- Source and book security for the launch event
- Brief staff and security on roles and responsibilities at the event
- Final set up of launch event

#### Key Stakeholders

<<Describe the proposed project governance structure according to the CBSA project management policy and procedures available from the CBSA website>> [Word guidance: 20 to 50 words]

Students must summarise the information provided and outline the key stakeholders (including internal and external). For example:

- Gavin Stead, CBSA
- Paul Thompson, CEO of Smart Travel Luggage and Co
- Margaret Page, Product Co-Ordinator from Smart Travel Luggage and Co
- Leah Wright, Marketing Manager from Smart Travel Luggage and Co
- Project Team
- Current Clients of STL
- Future Clients of STL
- Government agencies
- Media
- Event location (TBD)

<<Identify key decision-makers.>> [Word guidance: 5-20 words]

Students must summarise the information provided and outline the key decision-makers:

- Paul Thompson, CEO of Smart Travel Luggage and Co
- Margaret Page, Product Co-Ordinator from Smart Travel Luggage and Co
- Gavin Stead, CBSA
- Project Team

#### Project Budget

<<What is the budget? List the main project expenses and inclusions.>> Word guidance: 60 to 70 words

Students must summarise the information provided and outline the budget and main expenses. For example:

**\$100,000**

#### Inclusions:

- Location for launch – set up, equipment and pull-down post-event
- Catering



- Staff required to attend launch for serving food and drink, sign-ins and administration aspects
- Security required for launch
- Guest list collation and identify check arrangements at launch
- Name tags; marketing materials for launch (Marketing by STL)
- Marketing of the event
- Media contacts and expected arrangements

**Main expenses:**

**Equipment:**

- Event Location
- Staffing
- Security
- Marketing

**Project Timelines**

<<Outline project timelines.>>

Students must summarise the information provided and outline the main timelines, for example:

The launch is tentatively booked for **Saturday, 6 May 2023**

Meeting with the client:

14 March 2023

**Main timeline:**

**March 2023**

Brief Project team

Source event location options

Source staff supply options

Source security supply options

**April 2023**

Confirm equipment requirements

Source equipment requirements

Source and arrange catering for the event

Confirm staff for the event – brief on roles and responsibilities

Confirm security for the event – brief on roles and responsibilities

**May 2023**

Marketing brief with STL staff and representatives

Confirm circulation of event dates to relevant and interested parties via STL

Confirm estimated attendee numbers

Align with catering and seating arrangements

**June 2023**

Final arrangements confirmed

Staff briefing for the event – revisit and confirm

Administration finalisation of required paperwork, sign-in, name tags etc.

Set up and test equipment on the day of the event

## 2. Meeting with CEO

### Instructions to Assessor:

Before the meeting:

- Provide students with the date on which the meeting will be held.
- Review the Team Role Information below so you are clear on the requirement of your role
- Set up a quiet space for the meeting.
- Allocate 20 minutes for this meeting
- Ensure that the student has completed the **Draft Project Charter** before commencing this role play.

### Team Role Information:

**NOTE:** all role players are encouraged to contribute to the discussion as long as contributions are in line with Project Management Plan and the team roles below.

Gavin Stead [Assessor]

- Gavin is the CEO of CBSA and will participate in the project team to approve decisions throughout.
- Gavin will report the progress of the project to the CBSA Board
- Where required, Gavin may provide additional information to the discussions to help clarify specifics. The assessor should use discretion to provide additional fictional information to support the discussion and fill in any gaps required to clarify raised items.

Billy Walsh [Student]

- Billy is the Project Manager
- Billy is responsible for implementing the project

### During the meeting

You will act as Gavin Stead, CEO. In doing so, you need to lead and facilitate the meeting. Ensure that the following topics are covered:

- Welcome Billy to the meeting
- Confirm that the objective of the meeting is to discuss the Draft Project Charter and agree upon the project's scope.
- Listen to the information provided by the student about the project.
- Communicate the following details through the first meeting:
  - **Project Budget: \$100,000**
  - **Inclusions:**
    - *Location for launch – set up, equipment and pull-down post-event*
    - *Catering*
    - *Staff required to attend launch for serving food and drink, sign-ins and administration aspects*
    - *Security required for launch*
    - *Guest list collation and identify check arrangements at launch*
    - *Name tags; marketing materials for launch (Marketing by STL)*
    - *Marketing of the event*
    - *Media contacts and expected arrangements*
  - **Exclusions:**

- *Specified Agency/client invitations (to be conducted by STL)*
  - *Transport and set up STL products*
- **Project Timeline:**
  - *14 March to launch date of 6 May*
- **Resources:**
- **Project Team Members:**
  - *Billy Adams – Project Manager, CBSA*
  - *Kerry Adams – Administration and personal assistant. CBSA*
  - *Matthew Price – Event Co-ordinator CBSA*
  - *Stacey Robinson – Liaison and contact from Smart Travel Luggage concerning details, contacts and specifics from STL*
  
- **Steering Group**
  - *Gavin Stead representing CBSA*
  - *Paul Thompson, the CEO of Smart Travel Luggage and Co*
  - *Margaret Page, Product Co-Ordinator from Smart Travel Luggage and Co*
  - *Leah Wright, Marketing Manager from Smart Travel Luggage and Co*
- **Project Milestones:**
  - *Source location for the launch event*
  - *Book location for the launch event*
  - *Source and book materials/staff for the launch event*
  - *Source and book equipment for the launch event*
  - *Source and prepare for identity checks for the launch event*
  - *Source and book security for the launch event*
  - *Brief staff and security on roles and responsibilities at the event*
  - *Final set up of launch event*
- **Reporting:**
  - *All liaisons with STL representative on Project Team, Stacey Robinson, on a day-to-day basis*
  - *Weekly reporting to Margaret Page, STL*
  - *Fortnightly report to Steering Group on overall Project Management and timelines until 7 April 2023, then to*
  - *Weekly reports until launch date 6 May 2023*
- Also, ensure that you discuss key project tasks with the student to enable them to develop the work breakdown structure and project management plan. This can be brainstormed by discussing key activities associated with the project.
- Request that Billy adjusts the Draft Project Charter to incorporate the agreements and changes discussed during the meeting.

Throughout the meeting, ensure that the student has opportunities to utilise communication skills, including:

- speaking clearly and concisely when sharing and seeking information
- asking questions to identify required information
- using active listening techniques to elicit information and confirm understanding
- collaborating and cooperating with others to achieve shared goals
- negotiating with others to achieve outcomes.

### **After the meeting**

- The student will update the Project Charter in Part B of the assessment.

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 A: Project Charter

### Assessment checklist

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

Part A: Project charter		
1.	Draft project charter	<input type="checkbox"/>
3.	Update/revise the project charter	<input type="checkbox"/>

### Observation checklist

The assessor observed the student's 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 observe the assessment in real-time as they conduct the assessment)		Satisfactory (S)	Not Yet Satisfactory (NYS)
2.	The student presented and discussed the draft project charter. Look for: <ul style="list-style-type: none"> <li>clear rationale for every aspect of the Charter to gain the support and approval of the CEO for the proposed project scope</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
	The student demonstrated communication and teamwork skills, including: <ul style="list-style-type: none"> <li>ask questions to identify the required information</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>use active listening techniques to elicit information and confirm understanding</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
	Look for: <ul style="list-style-type: none"> <li>use open and closed questions, paraphrased to confirm understanding</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>collaborate and cooperate with others to achieve shared goals</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
	Look for: <ul style="list-style-type: none"> <li>negotiate with others to achieve outcomes</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>expressed opinions</li> <li>listened to Project Sponsor</li> <li>agreed on outcome</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>use active listening techniques to elicit information and confirm understanding</li> </ul>	<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 a <b>draft project charter</b> , and all fields were completed according to the benchmark. Refer to Guidance to Assessor benchmark.	<input type="checkbox"/>	<input type="checkbox"/>
3.	The student submitted a <b>final project charter</b> for approval, and all fields were completed according to the benchmark. Refer to Guidance to Assessor benchmark.	<input type="checkbox"/>	<input type="checkbox"/>

## Task instructions [for the student] Part B: Develop and negotiate approval of project management plan

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



To: Billy.walsh@cbsa.com.au  
From: gavin.stead@cbsa.com.au  
Date/time: Friday 11.25 am.  
Subject: Small Business Conference Project  
Attachment: Project Management Plan template.docx

Good morning Billy,

Thank you for sending the revised Project Charter. I can confirm that this is now approved.

Please move forward in developing an integrated draft Project Management Plan using the attached template.

We will review the draft PMP during the project team meeting next week.

Kind Regards,

Gavin Stead

Managing Director

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

[www.cbsa.com.au](http://www.cbsa.com.au)



### Attachment to e-mail:

- Project Management Plan Template.docx (separate attachment)

### Steps

Based on the e-mail, complete the following tasks

#### 1. Develop a draft Project Management Plan (PMP):

Using your Project Charter and research, develop a draft Project Management Plan using the **Project Management Plan Template** provided.

Your PMP must include, as a minimum, the following:

- Project scope and constraints
- Project stakeholders and roles and responsibilities
- Project Milestones
- Work Breakdown Structure and dependencies
- Change management
- Monitoring processes
- Project communication
- Cost management
- Risk management

Save the document as *Draft Project Management Plan*.

Print out a copy of this document to take to the project team meeting with you.

## 2. **Facilitate a Project Team Meeting:**

Your assessor will play the role of Gavin Stead, CEO, and you will need to arrange for other students/peers to play the role of CEO, Smart Travel Luggage and Co.

The objective of this meeting is to present and discuss your draft Project Management Plan. You need to facilitate this discussion and provide a clear rationale for every aspect of the plan to gain the support and approval of Gavin Stead, CEO CBSA and Paul Thompson, CEO of Smart Travel Luggage and Co. You may also seek further clarification during the meeting if required.

During the meeting, Gavin and Paul will seek to make changes to the Project Management Plan, which you may not agree with. You will be required to demonstrate your negotiation skills to achieve an agreeable outcome for all.

During the project meeting, your assessor will also be looking to see that you can demonstrate communication and teamwork skills, including:

- speaking clearly and concisely when sharing and seeking information
- asking questions to identify the required information
- using active listening techniques to elicit information and confirm understanding
- collaborating and cooperating with others to achieve shared goals
- facilitating effective group interactions to negotiate outcomes.

### **Role play instructions**

The role-play/meeting must include the assessor and one (1) other participant/s, must not exceed 20 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 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 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 20-minute limit.

Include this recording as part of your assessment submission.

### **3. Update/revise Project Management Plan:**

After the meeting, you will be required to make any adjustments or revisions to the Project Management Plan based on the agreements made during the meeting.

Ensure you submit both the draft and final Project Management Plan.

### **Submission instructions**

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



## Assessor instructions Part B: Develop and negotiate approval of project management plan

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 the student can undertake project planning and design processes.

### Guidance to assessor about the task

1. Prepare a draft Project Management Plan

Project Management Plan	
<b>Project Sponsor</b>	<i>Smart Travel Luggage and Co (STL)</i>
<b>Project Name:</b>	<i>STL Product Launch</i>
<b>Project Manager:</b>	<i>Billy Walsh</i>

**Background/Context:**

<<Provide a brief explanation of the background and/or context of the project.>> [Word guidance 12-25 words]

*Students must summarise the information provided in the e-mail in an applicable manner to provide adequate background on the project.*

**Example:**

*Arrange, set up and complete the Product Launch Event as outlined.*

*CBSA assisting small business with project management for the client Smart Travel Luggage and Co (STL)*

**Objective:**

<<What is the aim of this project?>> [Word guidance 20-50 words]

*Students must summarise the information provided in the e-mail and the information from the client established in the meeting/role play:*

**Example:** *can be more detailed based on the role/play information provided.*

- 1. Meet timelines set by the client*
- 2. Meet the budget set by the client*
- 3. Meet set expectations of the product launch event as outlined by the client*

**Target Outcomes:**

<<Benefit that the project intends to achieve.>> [Word guidance 15-20 words]

*Students must list the actual outcome required to meet the needs of the Project delivery. For example [can be more detailed based on the role/play information provided]:*

- 1. Deliver the new product event launch as determined by the client*

*2. Deliver new product event launch within the budget set by the client*

*3. Deliver the new product event launch within set timeframes and by the current Launch date of 6 May 2023*

How the success of the project will be measured:

<<Describe the measure(s) that will be used to indicate that the project has been successfully completed.>> [Word guidance 25-30 words]

*Students must detail their measurable outcomes and how they will record them. For example:*

*1. Successful launch event conducted*

*2. A minimum of 200 attendees at the event*

*3. Successful sign-up for new products from existing and/or new clients for STL*

**Project Scope and constraints:** [Word guidance 100-150 words]

<<Provide a scope statement that describes what the project does and does not include.>>

<<Identify constraints related to the project and how these constraints impact on project planning.>>

*Students must detail the scope of the project, its inclusions and exclusions and assumptions:*

**Example:**

*Arrange, set up and complete Product Launch Event as outlined for Client, Smart Travel Luggage and Co (STL)*

**Inclusions:**

*Location for launch – set up, equipment and pull-down post-event*

*Catering*

*Staff required to attend launch for serving food and drink, sign-ins and administration aspects*

*Security required for launch*

*Guest list collation and identify check arrangements at launch*

*Name tags; marketing materials for launch [Marketing by STL]*

*Marketing of the event*

*Media contacts and expected arrangements*

**Exclusions:**

*Specified Agency/client invitations [to be conducted by STL]*

*Transport and set up STL products*

**Assumptions:**

- Access to the event location for set up on the day of the event*
- Invitations and promotions to current clients of STL completed by the client*

**Project Stakeholders:**

<<Provide a list of project stakeholders detailing governance structure and project team roles and responsibilities.>> [Word guidance 50-60 words]

*Students must detail all relevant Stakeholders from the information provided to date. For example:*

**Internal Stakeholders**

- *Steering Group*
- *Gavin Stead representing CBSA*
- *Paul Thompson, the CEO of Smart Travel Luggage and Co*
- *Margaret Page, Product Co-Ordinator from Smart Travel Luggage and Co*
- *Leah Wright, Marketing Manager from Smart Travel Luggage and Co*
- *Project Team*
- *Billy Mason – Project Manager*
- *Kerry Adams – administration and personal assistant*
- *Matthew Price – Event Co-ordinator CBSA*
- *Stacey Robinson – Liaison and contact from Smart Travel Luggage concerning details, contacts and specifics from STL*

**External Stakeholder**

- *Current clients of STL*
- *Future clients of STL*
- *Media*
- *Government Agencies*
- *Event location staff*
- *Suppliers of serving staff*
- *Suppliers of security staff*

**Milestone list:**

<<Provide a summary list of milestones, including dates for each milestone. Include an introductory paragraph in this section providing insight into the milestones.>>

*Students can list the milestones expected as listed in the project. For example:*

*The following milestones list the key deliverables within this project to ensure the project plan timeline and objectives are being met efficiently, professionally and appropriately.*

<b>Milestone</b>	<b>Description</b>	<b>Date</b>
<b><i>Project initiation</i></b>	<i>Meeting with the client, details obtained for all aspects of the project</i>	<i>14 March 2023</i>
<b><i>Project Charter Finalised</i></b>	<i>Finalisation and approval of Project Charter</i>	<i>21 March 2023</i>
<b><i>Project Management Plan Finalised</i></b>	<i>Finalisation and approval of PMP</i>	<i>24 March 2023</i>
<b><i>Event location detail arranged:</i></b>	<i>Research and collation of information on locations available</i>	<i>14 April 2023</i>

## Project Management Plan

	<i>Decision made and booking confirmed</i>	
<b>Marketing of Launch Event</b>	<i>Liaise with and confirmation of details for marketing completion and activation by STL</i>	<i>18 April 2023</i>
<b>Equipment ordered:</b>	<i>Sourced and booked</i>	<i>21 April 2023</i>
<b>Resourcing arranged:</b>	<i>Resources and staffing required researched</i> <i>Booking and confirmation of availability</i>	<i>25 April 2023</i>
<b>Pre-Event Briefing of staff resources</b>	<i>Briefing of both serving, administration and security staff</i>	<i>5 May 2023</i>
<b>Event Set up</b>	<i>Equipment set up and test</i>	<i>6 May 2023</i>
<b>Event Execution</b>	<i>Event set up and arrangements</i>	
<b>Event Completion</b>	<i>Execution of launch event</i>	
<b>Project finalisation report, including budget</b>	<i>Finalisation of project reporting</i> <i>Including budget, change requests and explanations as needed</i>	<i>10 May 2023</i>
<b>Project evaluation</b>	<i>Evaluation of Project.</i>	<i>15 May 2023</i>

### Milestone Change requirements:

<<Include a text section that discusses actions taken if any changes to the milestones or delivery dates are required.>> [Word guidance 50-60 words]

*Students must show actions for milestone change requirements.*

### Benchmark

#### Example:

*Should there be a requirement to change an element of the milestones from the original approved PMP, then the following process will be followed:*

- Change request form completed*
- Liaison with Stacey Robinson and Margaret Page*
- Alternate plans discussed and outlined in the paperwork*
- Steering Group notified*
- Approval gained; alternate plan put in place*
- Update the PMP as needed*

### Change Management:

<<Describe change control processes.>> [Word guidance 50-60 words]

## Project Management Plan

*Students must describe the change control process. Students' words will vary, but their responses must reflect the content below.*

*Should there be a requirement to change an aspect of the project from the original approved PMP, then the following process will be followed:*

- *Change request form completed*
- *Liaison with Stacey Robinson and Margaret Page*
- *Alternate plans discussed and outlined in the paperwork*
- *Steering Group notified*
- *Approval gained; alternate plan put in place*
- *Update the PMP as needed*

### **Project monitoring:**

<<Describe processes/tools that will be put in place to monitor project activities and performance.>> [Word guidance 10–30 words]

*Students must outline the processes and tools to monitor the project activities and performance. Their responses may vary at the Diploma level. Acceptable responses are any points from the following list.*

*May include:*

- *Weekly Project team meetings and review of PMP and budget*
- *Adjustments to timelines as needed to ensure the event date is reached*
- *Any change requests/requirements handled quickly to the Steering Group for approval and updates*

### **Project Communications:**

<<List the project communications activities, including meetings and project status reports.>>

<b>Communication type</b>	<b>Description</b>	<b>Who</b>	<b>Frequency</b> <i>(daily, weekly, fortnightly)</i>	<b>Scheduled finish</b> <i>(date)</i>
<i>Weekly progress report</i>	<i>Overview of the project against</i>	<i>Project Manager</i>	<i>Weekly</i>	<i>Date</i>
<i>Weekly status report</i>	<i>All reports, plans and revisions of project documents to be provided</i>	<i>Project Manager Project team Steering Group</i>	<i>Weekly</i>	<i>Date</i>

## Project Management Plan

<i>Project progress report</i>	<i>Review and project kick-off and project plan document, which includes budget, schedule and scope.</i>	<i>Project Manager Project team Steering Group</i>	<i>Fortnightly</i>	<i>Date</i>
<i>Daily report</i>	<i>Daily progress and status updates</i>	<i>Project Manager Project team</i>	<i>Daily</i>	<i>Date</i>

<<Add or delete rows as required.>>

### Project Budget:

<<Include approved project budget as per project charter.>>

*\$100,000 allocated to the working budget*

<b>Cost area</b>	<b>Details</b>	<b>Estimated cost</b>
<i>Event location booking costs</i>	<i>Event location 3 hours for the event 2 hours before the event, access to set up 2 hours post event to shut down</i>	<i>\$21,000</i>
<i>Serving and administration staff</i>	<i>Serving staff x 6 Admin staff for check-in and ID checks x 6</i>	<i>\$6500</i>
<i>Security staff</i>	<i>Security staff for entry; inside and patrol x 8</i>	<i>\$7500</i>
<i>Security requirements</i>	<i>Handheld scanners x 4 for 24 hours</i>	<i>\$9000</i>
<i>Equipment</i>	<i>TBA for launch and media</i>	<i>\$6500</i>
<i>Catering</i>	<i>Finger food Beer, wine and soft drink Coffee and tea with selected small portion desserts up to 300</i>	<i>\$22,500</i>

## Project Management Plan

<i>Administrative costs</i>	<i>Printing, set up, Media contact etc</i>	<i>11,000</i>
<i>Miscellaneous</i>	<i>Delays, damage, contingency</i>	<i>10,000</i>
	<i>Total</i>	<i>\$94,000</i>

<<Add or delete rows as required.>>

### Risk management strategy:

<<List the major risks identified from the business case, as well as consequences of the risk occurring. Use the risk assessment legend to establish severity and likelihood. Document risk treatment/control measures.>>

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>
<b>Certain</b> >90% chance	High	High	Extreme	Extreme	Extreme
<b>Likely</b> 50% - 90% chance	Moderate	High	High	Extreme	Extreme
<b>Moderate</b> 10% - 50% chance	Low	Moderate	High	Extreme	Extreme
<b>Unlikely</b> 3% - 10% chance	Low	Low	Moderate	High	Extreme
<b>Rare</b> <3% chance	Low	Low	Moderate	High	High

Risk	Likelihood	Severity	Treatment/control methods
<i>Venue issue</i>	<i>Moderate</i>	<i>Major</i>	<i>Have back venue available to move to at short notice</i>
<i>Inclement Weather</i>	<i>Unlikely</i>	<i>Minor</i>	<i>Attendees to assist clients into the event location Provision of towels, umbrellas etc</i>
<i>Power Failure</i>	<i>Unlikely</i>	<i>Major</i>	<i>Back-up generators on standby should this occur to continue the event without interruption</i>

## Project Management Plan

<i>Catering unavailability</i>	<i>Moderate</i>	<i>Major</i>	<i>Alternate sources available</i>
<i>Communications</i>	<i>Unlikely</i>	<i>Moderate</i>	<i>Open and clear communication among the team</i> <i>Daily meetings to delegate tasks</i>
<i>Security Breach</i>	<i>Likely</i>	<i>Moderate</i>	<i>Processes in place to ensure attendees are on the invite list</i> <i>Attendees scanned for weapons, listening devices or any threat potential to attendees or product launch</i>

<<Add or delete rows as required.>>

## 2. Meeting with Project Team

### Before the meeting

- Provide students with the date on which the meeting will be held.
- Review the Team Role Information below so you are clear on the requirement of your role and the roles of actors.
- Arrange for actors to play roles. Ensure they have reviewed the team role information.
- Set up a quiet space for the meeting
- Allocate 15–20 minutes for this meeting
- Ensure that the student has completed the **Draft Project Management Plan** before commencing this role play.

### Team Role Information:



- **NOTE:** all role players are encouraged to contribute to the discussion as long as contributions align with the Project Management Plan and the team roles below.

### **Gavin Stead (Assessor)**

- Gavin is the CEO of CBSA and will participate in the project team to approve decisions throughout.
- Gavin should question the PMP and make suggestions for changes to the plan during this meeting (the assessor will need to use discretion when determining an adjustment to the plan). The idea here is not to 'pull apart' the PMP but to offer ideas for adjustment. Negotiate for adjustments, compromising where appropriate. Ensure suggestions are realistic and reasonable.
- Where required, Gavin may provide additional information to the discussions to help clarify specifics. The assessor should use discretion to provide additional fictional information to support the discussion and fill in any gaps required to clarify raised items.

### **Paul Thompson, CEO of Smart Travel Luggage and Co (other participant)**

- Paul is the CEO of Smart Travel Luggage
- Paul should raise ideas/concerns/suggestions about items related to the smart travel luggage launch
- The idea here is not to 'pull apart' the PMP but to offer ideas for adjustment. Negotiate for adjustments, compromising where appropriate. Ensure suggestions are realistic and reasonable.

### **Billy Walsh (Student)**

- Billy is the Project Manager
- Billy is responsible for implementing the project

### **During the meeting**

You will act as Gavin Stead CEO. In doing so, you should greet everyone and hand the meeting over to Billy (student) to facilitate as the Project Manager.

- Invite Billy (student) to present the draft PMP and facilitate the meeting
- Present a counter-argument to one of the student's proposed project inclusions. For example, state that:
  - Question budget allocations
  - Identify additional risks
  - Suggest additional communication strategies
  - Suggest adjustments or additional milestones
  - You do not need to present these exact arguments. You may suggest other ideas, but remember the idea is not to 'pull apart' the plan – it is to offer suggestions and adjustments to perfect the plan
- Ensure/invite Paul Thompson to offer her suggestions/ideas
- Encourage negotiation and agreement on adjustments
- Request that Billy (student) adjust the Draft Project Management Plan to incorporate the agreements and changes discussed during the meeting

Throughout the meeting, ensure that the student has opportunities to utilise communication skills, including:

- speaking clearly and concisely when sharing and seeking information
- asking questions to identify the required information
- using active listening techniques to elicit information and confirm understanding
- collaborating and cooperating with others to achieve shared goals
- facilitating effective group interactions to negotiate outcomes.

### **3. Revise the draft Project Management Plan**

- The revised Project Management Plan must include all agreed-upon adjustments during 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: Develop and negotiate approval of project management plan

### Assessment checklist

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

Part B: Develop and negotiate approval of project management plan		
Step 1.	Draft Project Management Plan	<input type="checkbox"/>
Step 2.	Role-play video evidence – meeting not exceeding 20 minutes	<input type="checkbox"/>
Step 3.	The revised project management plan	<input type="checkbox"/>

### Observation checklist

The assessor observed the student's 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]
Step 2.	Demonstrate negotiation skills to achieve an agreeable outcome	<input type="checkbox"/>	<input type="checkbox"/>
	Demonstrate communication and teamwork skills Look for: <ul style="list-style-type: none"> <li>speaking clearly and concisely when sharing and seeking information</li> <li>asking questions to identify the required information</li> <li>using active listening techniques to elicit information and confirm understanding</li> <li>collaborating and cooperating with others to achieve shared goals</li> <li>facilitating effective group interactions to negotiate outcomes.</li> </ul>	<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]

Step 1.	The student submitted a <b>draft Project Management Plan</b> , and all fields were completed according to the benchmark. Refer to Guidance to Assessor benchmark.	<input type="checkbox"/>	<input type="checkbox"/>
Step 3.	The student submitted a revised <b>Project Management Plan</b> and included modifications identified in step 2 – role play.	<input type="checkbox"/>	<input type="checkbox"/>

Congratulations, you have reached the end of Assessment 10!



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