



**BSBTWK502**

# Manage team effectiveness

Assessment 2 of 3

Case Study/Role-Play

**Assessor Guide**




## Assessment Instructions

### Task overview

You will demonstrate your ability to lead a team by establishing plans for group performance.

The assessment consists of **four [4]** parts and related tasks:

- Part A: Case Study - Prepare for the meeting
- Part B: Role-Play – Team meeting
- Part C: Case Study - Communicate with stakeholders
- Part D: Case Study - Address unresolved issues raised by stakeholders

	<p>The following assessment tasks use a simulated business called Complete Business Solutions Australia (CBSA). To complete the assessment tasks, you will access information, templates and workplace documents associated with CBSA.</p> <p>You can access <a href="#">CBSA's website</a> to familiarise yourself with what CBSA does and the services it provides.</p>
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## Assessment Information

### Submission

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

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

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

### Reasonable adjustment

Students may request a reasonable adjustment for assessment tasks.

Reasonable adjustment usually involves varying:

- the processes for conducting the assessment (e.g., allowing additional time)
- the evidence gathering techniques (e.g., oral rather than written questioning, use of a scribe, modifications to equipment)

However, the evidence collected must allow the student to demonstrate all requirements of the unit.

Refer to the Student Handbook or contact your Trainer for further information.



Please consider the environment before printing this assessment.

## PART A – Planning for Team Effectiveness

*For the purpose of this assessment, you are Adrian Russo, the newly appointed Marketing and Business Development Manager (MBDM) at CBSA. Your primary responsibility is to drive business growth. This includes creating development plans, forecasting sales targets and growth projections and identifying market opportunities in consultation with your colleagues.*

You are required to prepare for a meeting with your team: Kelly Chan, the Business Development Specialist and Adrian Russo, the Marketing Strategist.

Read the scenario above and the following email with the attachments, then complete the tasks that follow:



To: Sam Fischer [sam.fischer@cbsa.com.au]  
From: Gavin Stead [gavin.stead@cbsa.com.au]  
Date/time: Monday 12:25 pm.  
Subject: Preparation for Team Performance Meeting  
Attachments: Operational Plan.docx,  
Team Performance Plan Template.docx

Good afternoon Sam,

As you know, CBSA aims to become Australia's largest provider of business support and advocate of business needs. Our target market are the small, medium and enterprise-size organisations and we base our marketing strategy on electronic, event-based and traditional advertising.

Please undertake a meeting with your team to form a work group and work out a team performance plan to implement this year's marketing strategies and to achieve the organisation's strategic and operational goals by the end of the financial year. The meeting will be a great opportunity to outline each team member's responsibilities.

Please prepare a clear meeting agenda for the meeting. The meeting will need to focus on communication and accountability for better team performance.

Your meeting agenda needs to ensure that strategies are in place to encourage the team to participate in team discussions and own their decisions so we can ensure team performance.

During the meeting, you will need to consult with the team to develop a team performance plan. The plan should combine both teams' objectives, KPIs and training needs. As a follow-up, you will need to schedule a mid-cycle meeting in June and an end-of-cycle meeting in December.

Please refer to the 'Operational plan' and the 'Team Performance Plan template' attached to this email to use during the preparation phase and at the meeting itself.

Please copy me in the meeting invite that you are going to send to your team.

After the meeting, once you developed the team performance plan, please send it back to me.

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 1:

### Operational Plan.docx

UPCOMING MARKETING STRATEGIES					
Strategies	Actions	Timelines	Who	Resources needed	Performance indicators
Conduct market research to better understand client demographics	Member survey	By mid-20XX	Business Development Specialist	Staff time Survey monkey	We find out more about who our clients are and target potential clients to increase our customer base.
Developing marketing campaigns to promote our services	Blogs Social media Articles for local media Radio advertisements	Ongoing throughout year	Marketing strategist	Staff time \$25,000 marketing budget	Increase in sales volume
Public events	Undertake public events to raise organisational profile	Ongoing throughout year	Business Development Specialist	Staff time \$15,000 marketing budget	Increase in public awareness
Sponsorship	Provide sponsorship to raise organisational profile	Ongoing throughout year	Business Development Specialist	Staff time \$25,000 marketing budget	Increase in public awareness
Sales campaigns	Use specials to increase sales volume	Each quarter	Marketing strategist	Staff time	Increase in sales volume

Note:  
The Marketing and Business Development Manager (MBDM) is committed to oversee the team's performance, organise regular team meetings to ensure performance, support the team to overcome potential challenges and report to executives.

## Attachment 2:

### Team Performance Plan Template.docx

#### TEAM PERFORMANCE PLAN TEMPLATE

Name of Employees:

Plan timeframe:

Name of Manager:

Date of performance planning discussion:

Date of mid-cycle review discussion;

Date of end cycle review discussion:

1. Outputs, projects and deliverables/KPIs: What will your main work be this year?  
What elements of your work area's Operational Plan will you be responsible for or contribute to?
2. Conduct and behaviours: How will you do your work and interact with others this year?  
Organisation values are respect, collaboration and innovation.
3. Knowledge and skills: What do you need to do your job well this year?  
What learning and development activities will you undertake this year, and how will your new skills and knowledge be applied to the job?
4. What support is needed to do my job well?  
Are there any changes to the work environment or arrangements that would assist you to do your job?
5. How do I know if I am performing well?

What will be happening if you are performing well? [My customers are happy, I have good working relationships, my work is completed on time, and my work is accurate.]

#### Task 1: Prepare for the meeting

Review the information provided on the CBSA website and the email and its attachments from Gavin Stead, CBSA's Managing Director, then complete the *Preparation for the Meeting* document with the information required. This will assist you in undertaking the actual meeting in Part B of the assessment.

#### Assessor instructions:

Student must complete each section within the 'Preparation for the meeting' table. Refer to the table below for sample answers and benchmarks. Student must provide answers within the given word limit.

PREPARATION FOR THE MEETING
Organisation: CBSA
Date: Today's date
a) Provide a summary of the work group's purpose. [30-50 words]
The work group's purpose is to work out a team performance plan to implement this year's marketing strategies and to achieve the organisation's strategic and operational goals by the end of the financial year. The meeting will be a great opportunity to outline each team's responsibilities.

b) Outline the roles and responsibilities within the team in order to achieve the work group's purpose. (50-70 words)

**Roles:**

Sam Fischer – meeting's chairperson, Marketing and Business Development Manager

Kelly Chan - Business Development Specialist

Adrian Russo - Marketing Strategist

**Responsibilities:**

Sam Fischer will organise and lead the meeting to achieve work group's purpose.

The team (Kelly Chan and Adrian Russo) will participate at the meeting and contribute with ideas and suggestions on how they can achieve organisation's strategic and operational goals by the end of the financial year.

c) Identify **five (5)** strategies that you can use to facilitate the team's input into planning, decision making and operational aspects of team tasks. (90-110 words)

The following strategies will be implemented to ensure that the team can equally input into planning, decision making and operational aspects of team tasks:

- Create an environment/atmosphere that encourages learning, innovation, creativity and motivation
- Let others know that no idea is a bad idea, and all ideas are welcome
- Encourage quieter team members/colleagues to participate.
- Ensure there is consensus in the decisions, so people are not forced to make decisions they do not want to make or agree to things that make them uncomfortable.
- Provide time for decision-making processes, so it is not rushed or pressured.

d) Outline **five (5)** processes that can be used to identify and address issues, concerns and problems that the team members may identify. (100-120 words)

The following process will be used to identify and address issues, concerns and problems that the team members may identify:

- Identify the problems/issue by defining the problem as clearly and specifically as possible.
- Engage in discussions with team members – gather the reasons behind performance problems from those directly engaged in the work tasks and everyday team dynamics.
- Discuss the problems specific to the team and support them in voicing their thoughts and insights.
- Brainstorm potential solutions by asking team members for suggestions and providing responsibility to them to implement their agreed solutions.
- Evaluate potential solutions: Consider each option's pros and cons and how they might impact different stakeholders.
- Select the best solution and create a plan to implement the solution, and regularly revisit the team to either check the solution is effective or make further changes to the solution plan if necessary.
- Implement the solution: Ensure everyone involved is aware of their responsibilities and committed to the plan.
- Monitor and evaluate: Monitor its effectiveness and evaluate its success, including collecting feedback from stakeholders, reviewing data or metrics, or conducting a formal evaluation.

Student can identify any 5 from the above.

e) Outline the conventions and protocols that can be used when communicating with diverse stakeholders. (60-90 words)

I would use the following appropriate conventions and protocols when communicating with diverse stakeholders to ensure understanding and respect:

- Provide written information early to enable people from diverse backgrounds time to prepare
- Ensure that I do not use slang and jargon, whose meaning may be unclear to people from other backgrounds
- Use inclusive language that shows respect for others from diverse backgrounds.

f) Explain strategies that you could implement to support the team to meet expected performance outcomes using formal and informal learning opportunities. (40-60 words)

The team can be supported to meet the expected performance outcomes by receiving informal training sessions during staff meetings and one-on-ones meetings. A formal training session could be arranged to improve the team's performance, such as "How to be a high-performing team."

## Task 2: Create an agenda

Using the template provided, create a meeting agenda with an outline of what will be discussed during the meeting.

Ensure that the agenda includes strategies to encourage team input and facilitates the team's active participation in decision-making.

Topics will include:

- Discussion on the preparation of a team performance plan with expected outcomes
- Key performance indicators (KPIs) and goals for the team, including outputs, projects and deliverables.
- Formal and informal learning opportunities to support the team in meeting expected performance outcomes.
- The team performance plan needs to include details regarding any support that may be needed for the team and measures of success.

### Assessor instructions:

Student must complete the meeting agenda in the template provided. Refer to the table below for sample answers and benchmarks.

MEETING AGENDA	
Time of meeting	E.g., 10.30 am
Date of meeting	Today's date
Organisation's name	CBSA
Chair	Sam Fischer, Marketing and Business Development Manager
Attendees	Kelly Chan - Business Development Specialist Adrian Russo - Marketing Strategist

## Agenda items to be discussed and relevant information

Welcome and housekeeping

### Topic 1: Rules of engagement

Discuss and agree on protocols and processes we will use to encourage team members to participate in planning activities and establish a culture of open communication

### Topic 2: Scope

Outline the scope of the team meeting

### Topic 3: Roles and Responsibilities

Discuss and agree on the role and responsibilities of the team's members.

### Topic 4: Performance Plan

1. Brainstorm a team performance plan with expected outcomes, key performance indicators (KPIs) and goals for the work team to achieve the organisation's operational goals. Identify whether the team needs any support to achieve the KPIs.

### 2. Topic 5: Training needs

Determine the need to support the team to meet expected performance outcomes using formal and informal learning opportunities.

Follow-up actions and meeting close.

Next meeting?

Set date

## Task 3: Invite team participation

Write a meeting invitation to your team via email, which must:

- be written using the organisation's email template (available below)
- explain that they are being invited to a team performance planning meeting and the purpose of the meeting, which is to gain a common understanding of the year's goals and objectives and to ensure everyone understands what their role and responsibilities are.
- request that they review the Operational Plan and the tasks that they are to be responsible/accountable for, and note down their feedback and/or concerns
- have the Operational Plan and the meeting's agenda attached
- state the date and time of the meeting
- duration of the meeting (15 minutes)
- request that everyone brings their copy of the Operational Plan and notes.

The email will include professional language and will include 2-3 paragraphs to cover the information you will share. Copy Gavin Stead, Managing Director in the email by adding his name to the 'Cc' (i.e., carbon copy) section.

### Assessor instructions:

Student must write an email in the template provided. Refer to the sample answers and benchmarks below.



EMAIL TEMPLATE

To:	<<Add name(s) of main email recipients here>> Kelly Chan Adrian Russo
From:	<<Add your name and email address here>> Sam Fischer (sam.fischer@cbsa.com.au)
CC:	<<Add names of carbon copy email recipients here (leave blank if none)>> Gavin Stead
BCC:	<<Add names of blind carbon copy email recipients here (leave blank if none)>> Student should leave this empty
Date/Time:	<<Add the time and date of the email here>> E.g., 17/10/2023 10.30 am
Subject:	<<Add the subject of the email here>> E.g., Upcoming Team Performance Meeting (or similar)
Attachments:	<<Add the name of any attachments here (leave blank if none)>> Operational Plan, Meeting Agenda

Good morning/Good afternoon <<Add recipient(s) here>>,  
<<Add message here. Add as much space as necessary.>>

For example:

Good morning team,

I'm proposing this performance planning meeting to form a work group to implement this year's marketing strategies and to gain a common understanding of the year's goals and objectives and to ensure everyone understands what their role and responsibilities are.

Attached to this email you can find the Meeting Agenda with the topics that we will cover and the Operational Plan. The Operational Plan includes the tasks that you, as team, are to be responsible/accountable for. Please read it carefully before the meeting and bring a printed copy with you, so we can discuss it during the meeting. Please also feel free to note down your feedback and/or concerns that we will also discuss.

The meeting will be held next Monday, 23 October 2023, at 10 am and it will last for 15 minutes.

If you have any questions, feel free to contact me.

Many thanks,

Sam Fischer

Business Development and Marketing Manager

Kind regards,

<<Add your name here>>

<<Add your job position here>>

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

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



## Part B – Role-Play: Team Meeting

You will be required to conduct the meeting with your team to work out a team performance plan as a work group to implement this year's marketing strategies and to achieve the organisation's strategic and operational goals by the end of the financial year, outlining each team's responsibilities. As part of the meeting, you will be required to develop a team performance plan to brainstorm ways to reach the desired outcomes, KPIs and timeframes.

The team meeting focuses on gaining consensus and documenting this in the meeting minutes.

For this task, you will take on the role of Sam Fischer, CBSA's newly appointed Marketing and Business Development Manager (MBDM).

You receive the following phone message from Gavin Stead, CBSA's Managing Director:



*'Hi Sam. Thanks for organising the meeting and for sharing the meeting's agenda with me and your team. I would like you to undertake this meeting with your team. I won't be attending the meeting, so please let me know how it went once you have conducted it.'*

Based on the phone message, you are to facilitate the meeting with your team and complete the discussed section of the Team Performance Plan during the meeting, then write up the meeting minutes for our record. Once the documents are ready, please email them back to Gavin.

### Role-play instruction

The role-play must include yourself and **two [2]** participants, must not exceed **15 minutes** in duration and must address the following criteria:

- Use the information provided in Part A regarding the preparation for the meeting, including your answers within the *Preparation for the meeting* table in Task 1 and the meeting agenda in Task 2.

- Open the meeting with welcoming team members and build rapport with the audience, using interpersonal skills to gain the trust and confidence of the team.
- During the meeting you will need to:
  - Work out a team performance plan to achieve the organisation's strategic and operational goals by the end of the financial year, outlining each team's, including own role's responsibilities, as outlined in the Operational Plan.
  - Agree on and develop a team performance plan with expected outcomes, KPIs, training needs and measures of success.
  - Demonstrate your ability to consult team members to establish a common understanding and promote teamwork using collaboration.
  - Encourage team members to participate in planning activities, establish a culture of open communication and encourages the team to take responsibility.
  - Model desired behaviour and practices to the team members that contribute to team outcomes.
  - Provide feedback to encourage, value and reward the team for their participation, ideas and contribution to the process in a way that shows respect for the opinions, values and particular needs of others.
  - Engage in discussions and provide information to the team using appropriate professional vocabulary and non-verbal features to cater for the diverse audience's needs.

Participants to engage in the role-plays may be resourced using one of the following options:

1. Peers/family members or friends supportive of your studies who will play the role of each character. It is recommended that you share the context of the activity and role play expectations with them before conducting your role play.
2. Fellow students: Please contact your fellow students via the Discussion Forum and coordinate your role-play with them directly.

### **Option 1: Participating peer/ family members or friends**

Should you complete this task with your peers/ family members or friends, you must fully brief all participants, providing them with the context to the role-play/meeting, including the scenario, the Operational Plan and Team Performance Plan template in Part A of the assessment and the meeting agenda developed for Part B, so that they can prepare for the recording.

Inform participating peers/family members or friends that by participating in the role-play recording, they give their consent to be recorded for assessment purposes.

### **Option 2: Fellow student participants**

Fellow students participating in the recording must be provided with the context of their role and responsibilities in the session and have reviewed the assessment tasks, including the scenario, the Operational Plan and Team Performance Plan template in Part A of the assessment and the meeting agenda developed for Part B, to prepare for the recording.

Inform participating fellow students that by participating in the role-play recording, they give their consent to be recorded for assessment purposes.

### **Role-play Characters**

- You, the student will play the role of Sam Fischer, Marketing and Business Development Manager at CBSA.
- A peer/ fellow students will be:
  - Kelly Chan, Business Development Specialist at CBSA
  - Adrian Russo, Marketing Strategist at CBSA
  - Note: Gavin Stead, Managing Director at CBSA was also invited to the meeting, but is absent. You will note this in your meeting minutes.

## Step 1: Role-play:

You will play the role of Sam Fischer, Marketing and Business Development Manager at CBSA. You will use the preparation you carried out in Part A of the assessment, including Tasks 1, 2 and 3, the Operational Plan, the Team Performance Plan template and the agenda to hold a meeting with your team.

During the meeting you will need to set up a schedule of monthly meetings for the next 12 months to support the team's Operational Plan. This will be captured in the Team Performance Plan.

Review the requirements detailed in the 'Role-play instructions' section above.

You can close the meeting when you are satisfied that each of your team members understands their job role and that you understand the support you need from them.

## Instructions to participants:

### Role 1: Kelly Chan

The participant playing the role of Kelly Chan will be supportive of the presented information, direction and the thinking behind the plans. This role plays a key role in the success of the business and will contribute a lot.

When asked about own responsibilities, Kelly should list her roles based on the Operational Plan, such as:

- *I will be responsible for:*
  - *conducting market research to better understand client demographics.*
  - *public events.*
  - *sponsorships.*

Kelly should sit quietly. She sits and listens with open body language and nods her head, but she does not speak unless she is directly asked a question. If the student asks Kelly a question, she will offer the following statement: *'I think what everyone else said is good'*.

If the student probes again, start to share ideas quietly, such as:

- *Maybe CBSA could participate at health awareness campaigns and community fundraising initiatives, such as My Marathon by the Heart Foundation, Red Socks Run, organised by Kidney Health Australia or the One Step Forward campaign by the Black Dog Institute.*
- *Should I present sponsorship and public events ideas to you or organise a meeting with Gavin as well?*
- *How often should we have a public event that we can attend or participate at?*

Due to her circumstances, Kelly wants to have time-in-lieu if she needs to attend events outside business hours and she would like a work phone to contact the partners.

The answers given to these questions can be provided at your discretion, but it needs to be relevant to CBSA's profile and the Operational Plan.

In regards to the resources and support Kelly's asking, you need to reassure Kelly that you are going to raise these with the Managing Director and ask for approval, then get back to her with a response.

### Role 2: Adrian Russo

The participant planning the role of Adrian Russo, Marketing Strategist will sit back with his arms crossed against his chest during the discussion.

When asked about own responsibilities, Adrian should list his roles based on the Operational Plan, such as:

- *I will be responsible for:*
  - *Developing marketing campaigns to promote our services.*
  - *Sales campaigns.*

He should interrupt others with some negative comments, such as the following:

- *But we've tried that before, and it doesn't work.*
- *Will we get extra time for this?*
- *How do we make sure that management will help us achieve this?*

Adrian is a little 'tired' of all the ideas and changes. He is not keen to try new things and feels too much pressure on the team to work towards goals. He will become happier, and her body language will open up as the meeting progresses and then start contributing positive ideas such as the following:

- *Well, maybe we can offer our team members the opportunity to join smaller working groups.*
- *How about we make time in the big staff meeting to discuss the goals.*

When asked, Adrian expressed his concern that he is not confident with writing blogs and how the platform works, but he's open to learn about it. He prefers attending a formal training session, but meanwhile he is happy to research blogging platforms to gain some general understating of how they work.

Again, when addressing Adrian's concerns regarding the support he needs, you need to reassure him that you are going to raise these with the Managing Director and ask for approval, then get back to him with a response.

## Recording instructions

Your role-play must be recorded with all participant/s captured in a virtual room using a platform such as Zoom, Skype or Teams.

The recording must be clearly labelled *BSBTWK502\_02\_Role-play <<Student Name>>* and submitted with your assessment for marking.

Consent to participate in the recording must be captured for all participants at the start of the meeting. This is achieved by the student [you] reading the following statement at the start of the recording:

*"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 give their consent to appear in this recording."*

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

Include this recording as part of your assessment submission.

## Assessor Observation Checklist

### Assessor instructions:

The assessor must watch the recording and complete the below Observation Checklist to ensure the student has met all requirements. Throughout the role-play, the student will provide information and receive feedback relating to the role-play that has been provided to the participant.

Below is a table for you to assess the student if they have demonstrated competency in this task.

### Observation Checklist

*To be completed by the assessor*

### Role-play – Team Meeting

During the Role-play, the student must demonstrate the following:

Observed

Assessor's Comments

1.	<p>Uses the information provided in part A of the assessment to chair a team meeting.</p> <p>The student must follow the agenda to agree on processes for working together, the purpose of the meeting and agree on roles and responsibilities, including own role and how it contributes to broader organisational goals.</p> <p>Look for:</p> <p>The student must conduct a team meeting using the agenda and preparation they developed in Part A Task 2 of this assessment.</p> <p>The student chairs a team meeting, following the prepared agenda, including the following tasks:</p> <ul style="list-style-type: none"> <li>• Welcomed the team and communicated the purpose of the meeting.</li> <li>• Discussed and agreed on the team ground rules. For example, a process of how the team treats each other, communicates, participates, deals with conflict, cooperates and supports each other. Such as let's listen to each other and respect views by acknowledging them.</li> <li>• Indicated the importance of actively participating in discussions – their feedback will be considered and included in the team performance planning framework. For example, letting them know that things will be more achievable if we work together.</li> <li>• Discussed and agreed on the purpose of the project team</li> <li>• Discussed and agreed on roles and responsibilities, including own role and how it contributes to broader organisational goals.</li> </ul>	<p><input type="checkbox"/> Yes</p> <p><input type="checkbox"/> No</p>	
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	<ul style="list-style-type: none"> <li>Student's role, according to the Operational Plan, is to oversee the team's performance, organise regular team meetings to ensure performance, support the team to overcome potential challenges and report to executives.</li> </ul> <p>Responses will vary and will be in the student's own words.</p>		
2.	<p>During the meeting, agree on a performance plan.</p> <p>Look for:</p> <p>The student will engage with the team to discuss and agree on a performance plan to achieve the organisation's strategic and operational goals by the end of the financial year, outlining each team's, including expected outcomes, KPIs, training needs and measures of success.</p> <p>The discussion will use methods to engage the team, e.g., brainstorming to agree on a plan.</p> <p>Answers to the Performance Plan's questions:</p> <p>1) What will your main work be this year?</p> <p>Kelly will be responsible for conducting market research to better understand client demographics, public events and sponsorships.</p> <p>Adrian will be responsible for developing marketing campaigns to promote our services and for sales campaigns.</p> <p>Sam will be responsible to oversee the team's performance, organise regular team meetings to ensure performance, support the team to overcome potential challenges and report to executives.</p> <p>2) How will you do your work and interact with others this year?</p> <p>We will embed the organisational values in our work to communicate with all stakeholders with respect, be open for collaboration and try to promote innovation.</p> <p>3) What do you need to do your job well this year?</p> <p>Learn about blogging and related platforms</p> <p>4) What support is needed to do my job well?</p> <p>Work phone, time-in-lieu for attending events outside of work hours.</p>	<input type="checkbox"/> Yes  <input type="checkbox"/> No	

	<p>5) How do I know if I'm performing well? We have good working relationships with the partners.</p> <p>Responses will vary and will be in the student's own words.</p>		
3.	<p>Demonstrate your ability to consult team members to establish a common understanding and promote teamwork using collaboration.</p> <p>Look for:</p> <p>The student will consult with the team to establish a common understanding, including establishing ground rules for interacting, sharing information and inviting feedback and discussion. For example, actively participating in discussions – their feedback will be considered and included in the team performance planning framework. For example, letting them know that things will be more achievable if we work together. The student will promote teamwork through collaboration, for example, using techniques such as small group discussions, writing ideas on post-it notes and brainstorming, and creating opportunities for quiet people to speak up and be heard.</p> <p>Responses will vary and will be in the student's own words.</p>	<input type="checkbox"/> Yes  <input type="checkbox"/> No	
4.	<p>Encourages team members to participate in planning activities, establishes a culture of open communication and encourages the team to take responsibility.</p> <p>Look for:</p> <p>The student will encourage team members to participate in planning activities, establish a culture of open communication, and encourage the team to take responsibility. For example, techniques such as brainstorming or inviting individual team members to speak up were used to provide opportunities for participation. Reminders were given of the rules of engagement to facilitate a culture of open communication, e.g., there are no silly questions and encourages ownership by facilitating the team to arrive at their own solutions/consensus decisions.</p> <p>Responses will vary and will be in the student's own words.</p>	<input type="checkbox"/> Yes  <input type="checkbox"/> No	
5.	<p>Models desired behaviour and practices to the team members that contribute to team outcomes</p>	<input type="checkbox"/> Yes  <input type="checkbox"/> No	



	<p>Look for:</p> <p>The student will model desired behaviour and practices to the team members to contribute to team outcomes. For example, they are positive, welcoming and open to ideas and input. The student reacts positively to concerns and uses them to improve the team's effectiveness. The student is respectful and acknowledges others' contributions.</p> <p>Responses will vary and will be in the student's own words.</p>		
6.	<p>Provides feedback to encourage, value and reward the team for their participation, ideas and contribution to the process</p> <p>Look for:</p> <p>The student will encourage, value and reward the team for their participation, ideas and contribution to the process. For example, take opportunities to provide feedback and acknowledge others' contributions, use affirmation to value ideas, e.g., use the person's name, says, 'I like that idea; tell me more about it.' The student rewards others but, using public acknowledgement, attributes ideas to the author and offers to feedback details to line management of people's ideas/contributions.</p> <p>Responses will vary and will be in the student's own words.</p>	<input type="checkbox"/> Yes  <input type="checkbox"/> No	
7.	<p>Engages in discussions and provides information to the team using appropriate vocabulary and non-verbal features.</p> <p>Look for:</p> <p>Demonstrates oral communication skills, including:</p> <ul style="list-style-type: none"> <li>• Uses vocabulary appropriate to establish a supportive environment, such as respectful interactions and encouraging the team member to contribute and participate. For example, use active listening skills to understand and paraphrase your team's words. Uses non-verbal features, such as eye contact, confirming understanding, turning towards the speaker, and gestures to acknowledge the speaker.</li> </ul> <p>Responses will vary and will be in the student's own words.</p>	<input type="checkbox"/> Yes  <input type="checkbox"/> No	

8.	<p>Use oral communication during the meeting, including:</p> <ul style="list-style-type: none"> <li>• Listening and questioning techniques to confirm own and others' understanding and to use strategies to engage the audience</li> </ul> <p>Look for:</p> <p>Demonstrates oral communication skills, including:</p> <ul style="list-style-type: none"> <li>• Uses listening and questioning techniques to confirm own and others' understanding and to use strategies to engage the audience, such as active listening techniques, clarifying understanding, asking open-ended questions, and using positive verbal and nonverbal language. For example, uses effective questioning to clarify or draw out further issues where required and asks questions that have no specific answer but offer people the opportunity to share their ideas.</li> </ul> <p>Responses will vary and will be in the student's own words.</p>	<input type="checkbox"/> Yes  <input type="checkbox"/> No	
9.	<p>Uses oral communication during the meeting, including:</p> <ul style="list-style-type: none"> <li>• Selects and uses appropriate conventions and protocols when communicating with diverse stakeholders</li> </ul> <p>Look for:</p> <p>Demonstrates oral communication skills, including:</p> <ul style="list-style-type: none"> <li>• Selects and uses appropriate conventions and protocols when communicating with diverse stakeholders, such as adapting communication. For example, allows additional time to enable people from diverse backgrounds to process and contribute, does not use slang and jargon as meaning may be unclear to people from other backgrounds and uses inclusive language that shows respect for others from diverse backgrounds.</li> </ul> <p>Responses will vary and will be in the student's own words.</p>	<input type="checkbox"/> Yes  <input type="checkbox"/> No	
10.	<p>Uses interpersonal skills to gain the trust and confidence of the team and provides feedback to others in forms that can be understood and used</p> <p>Look for:</p>	<input type="checkbox"/> Yes  <input type="checkbox"/> No	

	<p>The student uses interpersonal skills to gain the trust and confidence of the team and provides feedback to others in forms that can be understood and used. For example, being positive about the opportunity to interact and engage to achieve outcomes, welcomes questions, input and expressed concerns from the team and provides feedback to encourage further participation and idea sharing.</p> <p>Responses will vary and will be in the student's own words.</p>		
11.	<p>Adapts personal communication style to build positive working relationships and to show respect for the opinions, values and particular needs of others</p> <p>Look for:</p> <p>The student uses strategies to effectively facilitate the planning session, such as adapting communication style to build positive working relationships and to show respect for the opinions, values and particular needs of others. For example, use team-building techniques, such as ensuring that the quiet staff can speak, encouraging participation and celebrating decisions and respecting and acknowledging the team and their ideas and concerns. For example, 'I hear what you are saying, and that is a challenge, but I think we can overcome it as a team'.</p> <p>Responses will vary and will be in the student's own words.</p>	<input type="checkbox"/> Yes  <input type="checkbox"/> No	

## Part C – Communicate with Stakeholders

You will communicate effectively with stakeholders about the developed team performance plan developed during the team meeting.

### Task 1: Communicate with the Managing Director

Following the meeting with your team, you will communicate effectively with the main stakeholder, Gavin Stead, Managing Director, about the developed Team Performance Plan.

You will prepare documents to be submitted to Gavin Stead. The documents include the following:

- a) Meeting minutes confirming the purpose of the meeting and the agreed roles and responsibilities. (Use the template provided.)
- b) Completed Team Performance Plan. (Use the template provided.)
- c) An email to Gavin Stead, Managing Director, using the organisation's email template], and provide him with an update on the process and agreed outcomes. You will need to flag the support your team has been asking for during the meeting and obtain the Managing Director's approval on them. Review Gavin's email in Part A of this assessment to ensure you are following his instructions. The email will be in professional language and will be 2-3 paragraphs. Ensure you attach the minutes and the completed Team Performance Plan to your email.

Assessor instructions:

Student is required to write down the meeting minutes based on the meeting they had in Part B of the assessment. See sample answers provided below for guidance.

MEETING MINUTES	
Location	Online via Zoom
Date	Today's date
Chair	Sam Fischer, Marketing and Business Development Manager
Attendees	Kelly Chan, Business Development Specialist Adrian Russo, Marketing Strategist
Absences	Gavin Stead, Managing Director
Time	E.g., 10.30 am

## Agenda Items

The meeting will consist of the following items:

- <<Item 1 – adjust items as necessary by editing, adding extra items, or deleting items>>
- <<Item 2>>

### Welcome and housekeeping

#### Topic 1: Rules of engagement

The team agreed to be engaged in open and respectful communication, allowing everyone to contribute with ideas,

#### Topic 2: Scope

The meeting's purpose is to form a work group to discuss and develop a performance plan to implement this year's marketing strategies and to achieve the organisation's strategic and operational goals by the end of the financial year, outlining each team's, including expected outcomes, KPIs, training needs and measures of success.

#### Topic 3: Roles and Responsibilities

- Kelly will be responsible for conducting market research to better understand client demographics, public events and sponsorships.
- Adrian will be responsible for developing marketing campaigns to promote our services and for sales campaigns.
- Sam will be responsible to oversee the team's performance, organise regular team meetings to ensure performance, support the team to overcome potential challenges and report to executives.

#### Topic 4: Performance Plan

Brainstormed a team performance plan with expected outcomes, key performance indicators (KPIs) and goals for the work team to achieve the organisation's operational goals.

Support for the team: Kelly needs a work phone to contact partners and asks for time-in-lieu if she needed to attend events outside business hours.

#### Topic 5: Training needs

Adrian is open to learn how to use blogging platforms.

Next meeting? From next month a check-in meeting will be held on each the first Monday of each month, for 12 months.

## Action Items

To following actions are outcomes of the meeting that need to be completed: <<add as many rows as necessary>>

Action Item	Responsibility	Deadline	Status
Sam to obtain approval for Kelly's work phone and time-in-lieu	Sam Fischer	By the next meeting	In progress
Adrian to research blogging platforms	Adrian Russo	By the next meeting	TBC

Assessor instructions:

Student is required to complete the Team performance plan below based on the meeting they had in Part B of the assessment. See sample answers provided below for guidance.

TEAM PERFORMANCE PLAN	
Name of Employees:	Kelly Chan Adrian Russo
Plan timeframe:	12 months
Name of Manager:	Sam Fischer
Date of performance planning discussion:	Today's date
Date of mid-cycle review discussion;	June
Date of end cycle review discussion:	December
<p>1. Outputs, projects and deliverables/KPIs:</p> <p>What will your main work be this year? What elements of your work area's Operational Plan will you be responsible for or contribute to?</p> <p>Identify <b>one (1)</b> measurable KPI for each team member.</p>	<p>Kelly will be responsible for conducting market research to better understand client demographics, public events and sponsorships.</p> <p>KPI: Kelly to conduct a market research by the end of the month.</p> <p>Adrian will be responsible for developing marketing campaigns to promote our services and for sales campaigns.</p> <p>KPI: Adrian to present his plans for a market campaign by the end of the month.</p> <p>Sam will be responsible to oversee the team's performance, organise regular team meetings to ensure performance, support the team to overcome potential challenges and report to executives.</p> <p>KPI: Sam to conduct monthly team meetings for 12 months to ensure team's performance.</p>
<p>2. Conduct and behaviours:</p> <p>How will you do your work and interact with others this year?</p> <p>Organisation values are respect, collaboration and innovation.</p>	<p>We will embed the organisational values in our work to communicate with all stakeholders with respect, be open for collaboration and try to promote innovation.</p>
<p>3. Knowledge and skills:</p> <p>What do you need to do your job well this year?</p> <p>What learning and development activities will you undertake this year, and how will your new skills and knowledge be applied to the job?</p>	<p>Learn about blogging and related platforms</p>

<p>4. What support is needed to do my job well? Are there any changes to the work environment or arrangements that would assist you to do your job?</p>	<p>Work phone, time-in-lieu for attending events outside of work hours; training on how to use blogging platforms.</p>
<p>5. How do I know if I am performing well? What will be happening if you are performing well? (My customers are happy, I have good working relationships, my work is completed on time, and my work is accurate.)</p>	<p>We will have good working relationships with the partners.</p>

**Assessor instructions:**

Student is required to write an email to Gavin Stead, Managing Director to provide him with an update on the process and agreed outcomes of the meeting they had in Part B of the assessment. See sample answers provided below for guidance.

EMAIL TEMPLATE	
To:	<<Add name[s] of main email recipients here>> Gavin Stead
From:	<<Add your name and email address here>> Sam Fischer (sam.fischer@cbsa.com.au)
CC:	<<Add names of carbon copy email recipients here (leave blank if none)>> Student should leave this empty
BCC:	<<Add names of blind carbon copy email recipients here (leave blank if none)>> Student should leave this empty
Date/Time:	<<Add the time and date of the email here>> E.g., 17/10/2023 10.30 am
Subject:	<<Add the subject of the email here>> E.g., Report on the team performance meeting [or similar]
Attachments:	<<Add the name of any attachments here (leave blank if none)>> Team Performance Plan, Meeting minutes
<p>Good morning/Good afternoon &lt;&lt;Add recipient[s] here&gt;&gt;, &lt;&lt;Add message here. Add as much space as necessary.&gt;&gt;</p> <p>For example:</p> <p>Hi Gavin,</p> <p>Hope this finds you well. As you know, we had the team meeting and formed a work group to work out a team performance plan to implement the company’s marketing strategies. I ensured that everyone understood what their role and responsibilities were.</p>	

Attached to this email you can find the Meeting Minutes and the completed Team Performance Plan, as you requested. Following your instructions, we will meet monthly for a check-in to ensure the team is on the right track with their goals.

Let me know what you think once you had a look at the attached documents.

Also, the team raised some issues that could be a potential blocker for them achieving the team's goals:

- Kelly was asking for a work phone to be able to communicate with clients and requested time in lieu in case she needed to attend events outside of work hours. Kindly consider and approve her request.
- Adrian expressed his concerns regarding blogging as he has no experience in using these platforms. I asked him to research blogging platforms to gain a general understanding of blogging, but it would be great if he could attend some formal training to learn how to use these platforms. Kindly consider and approve his request.

Many thanks,

Sam Fischer

Business Development and Marketing Manager

Kind regards,

<<Add your name here>>

<<Add your job position here>>

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222


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## Part D: Address unresolved issues raised by stakeholders

Gavin reviewed the meeting minutes and Team Performance Plan you have sent through in Part C Task 1. He was pleased with the outcome, approved both team members' requests and was looking forward to the team's work.

Two weeks after the team meeting, you received the following email from Gavin. Read the email carefully, then complete the tasks that follow:

	To:	Sam Fischer (sam.fischer@cbsa.com.au)
	From:	Gavin Stead (gavin.stead@cbsa.com.au)
	Date/time:	Thursday 2.42 pm.



Subject: Underperforming staff member

Good afternoon Sam,

Hope you are well, I need to inform you that I have received a number of complaints about Kelly, your Business Development Specialist. A summary of these is provided below:

- Kelly is often taking personal calls on her new work mobile phone while being in meetings with our partners.
- Clients find it challenging to reach Kelly during working hours. Other staff are picking up calls that Kelly should be answering.
- If someone wants to speak directly to Kelly and she is on her mobile, she says, 'I'll call them back later' – but she never does. Sometimes she leaves the office to make her personal calls.
- Kelly has had some longer lunch breaks lately – staff feel she is not working back to make up the time lost.
- Staff are falling behind with their own work because they are dealing with Kelly's phone calls and trying to help her meet her deadlines.
- The staff are starting to get irritable and snappy with each other – this is not demonstrative of CBSA's values!

The staff had said that this behaviour has only been happening for the past two weeks and seemed to become more obvious once Kelly had time-in-lieu approved.

Kelly was previously a hard-working and reliable staff member. Her help and support to others in CBSA were invaluable. Because of this, the staff have not been comfortable coming forward with their complaints and have let the issue slide. Now everyone is stressed, and the workplace is not as friendly or happy as it used to be. Staff fear that they will look bad if they take personal calls, which were once allowed if in moderation and kept short.

I would like you to address the issue and email Kelly to manage her underperformance.

Kind Regards,

Gavin Stead

Managing Director

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

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## Task 1: Address the issue

Using the template provided, write an email to Kelly to outline the concerns raised. The email will include professional language and will include 3-5 paragraphs, including:

- Provide a brief and objective overview of the concerns raised.
- Suggest a minimum of two (2) corrective actions that can assist in finding a mutually beneficial solution. The corrective actions should contain strategies to provide support as well as to monitor Kelly's performance.
- Ensure that your email is respectful and objective, not passing blame or judgement. The tone of your email should build trust to allow Kelly reaching out for support if that's what she needed.

Assessor instructions:

Student must write an email using the template to address the concern related to Kelly's performance and suggest two corrective actions to provide support as well as to monitor Kelly's performance. The email must be respectful and objective. See sample answer below for guidance.

EMAIL TEMPLATE	
To:	<<Add name(s) of main email recipients here>> Kelly Chan
From:	<<Add your name and email address here>> Sam Fischer [sam.fischer@cbsa.com.au]
CC:	<<Add names of carbon copy email recipients here (leave blank if none)>> Student should leave this empty
BCC:	<<Add names of blind carbon copy email recipients here (leave blank if none)>> Student should leave this empty
Date/Time:	<<Add the time and date of the email here>> E.g., 17/10/2023 10.30 am
Subject:	<<Add the subject of the email here>> E.g., Concerns (or similar)
Attachments:	<<Add the name of any attachments here (leave blank if none)>> Student should leave this empty
<p>Good morning/Good afternoon &lt;&lt;Add recipient(s) here&gt;&gt;, &lt;&lt;Add message here. Add as much space as necessary.&gt;&gt;</p> <p>For example:</p> <p>Hi Kelly,</p> <p>Hope this finds you well.</p> <p>I wanted to thank you for the suggestions you made during the last team meeting. I am confident the team will achieve some great outcomes this year!</p> <p>However, I am worried about you lately. I noticed that you are often away from the office and your clients may not be able to reach you at times. You have always been such a reliable staff member and I feel I need to ensure that you feel valued and supported at work. Is everything going well in your life? If you need any help or support, I'm always here for you. Please remember, that while CBSA tries to provide a supportive environment for its employees, it is important that we respect some basic rules at the workplace, such as making/taking personal phone calls during break time and respecting our clients by not taking personal phone calls during the meetings with them.</p> <p>To ensure your performance is not impacted, I'm setting up a quick 15-minutes check-in every morning at 9 am for two weeks so we can quickly talk through your daily tasks to ensure that you have no blockers or challenges in completing these tasks. I also want you to attend our staff wellbeing training where you may learn some useful strategies to manage stress.</p> <p>Let me know if you have any questions.</p> <p>See you tomorrow morning at our check-in meeting.</p> <p>Kind regards,</p>	

Sam Fischer

Business Development and Marketing Manager

Kind regards,

<<Add your name here>>

<<Add your job position here>>

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

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



## Task 2: Evaluate corrective actions

In the table below, list the corrective actions included in your email to Kelly in Part D Task 1 of this assessment, including the strategies to provide support as well as to monitor her performance, then explain how these strategies can support Kelly's performance.

### Assessor instructions:

Student must list the corrective actions included in the email to Kelly, including the strategies to provide support as well as to monitor her performance. Student must explain how these strategies can support Kelly's performance. See sample answer below for guidance.

Corrective actions [2-10 words]	Explanation [30-50 words]
Daily morning check-ins	This provides an opportunity for Kelly to discuss privately with her manager and reveal any personal issues she may have that impact her performance. This may also help Kelly stay focused on the daily tasks and flag any blockers she may have.
Staff wellbeing training	This may equip Kelly with strategies to cope effectively with stress. This is also a great opportunity to learn more about mental wellbeing and support services she can contact if required.

### Additional responses:

- Offering coaching or counselling to support Kelly with performing her work better. Working closely with her may help understanding her issues better and allows finding tailored solutions.
- Complete performance appraisal to discuss Kelly's strengths and weaknesses and finding support strategies that can support her perform better.

## Assessment checklist:

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

Part A: Prepare for the meeting		
Task 1	Complete the <i>Preparation for the meeting</i> table	<input type="checkbox"/>
Task 2	Write meeting's agenda	<input type="checkbox"/>
Task 3	Write email to invite team to the meeting	<input type="checkbox"/>
Part B: Conduct a meeting		
Task 1	Record and submit the role-play video	<input type="checkbox"/>
Part C: Communicate with stakeholders		
Task 1	a) Write up meeting minutes b) Develop Team Performance Plan c) Write an email to Managing Director	<input type="checkbox"/>
Part D: Address unresolved issues raised by stakeholders		
Task 1	Write email to Kelly to manage performance	<input type="checkbox"/>
Task 2	Evaluate corrective actions	<input type="checkbox"/>



**Congratulations, you have reached the end of Assessment 2!**

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