



BSBTWK401

ASSESSOR GUIDE

Build and maintain business relationships

Assessment 3 of 3

Role-play

Assessment Instructions

Task overview

This assessment is a role-play in which you will play the role of a Regional Business Development Officer at Ace Finance. Another participant will play the role of Robert, the owner/manager at Ace Finance. The role-play requires you to:

- use problem-solving techniques to negotiate solution to an identified problem
- identify methods to improve the quality of business relationships.

This activity is to be conducted with one other participant in which you will seek and respond to feedback from Robert the owner/manager at Ace Finance.

Additional resources and supporting documents

To complete this assessment, you will need:

- Internet access and Teams Meeting
- A quiet indoor location.

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.

Role-play Instructions

The role play/meeting must include at least number two (2) participants, must not exceed 10 minutes duration and must address all elements of the Observation Checklist below.

In this task you will participate in a role play meeting with a supervisor. The supervisor may be resourced using your Supervisor where you are already working, in the industry your qualification relates to.

Your workplace Supervisor must be fully briefed ahead of the recording. You must provide them with the context to the role-play/meeting, a role outline to play and a copy of the observation checklist so that they can prepare for the recording.

Your role-play must be recorded with your supervisor 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 participants 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 their name and job title to inform consent.

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

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

Include this recording as part of your assessment submission.

Scenario

Consider the following situations:

1. A person with a disability is a new business contact who attended the financial literacy training and has now lodged a formal complaint about the venue not having a ramp. He says that providing wheelchair access is mandatory in all public spaces and is outraged you selected this venue knowing his disability. He is highly dissatisfied with Ace Finance and his treatment as a fee-paying client.
2. He is threatening to report Ace Finance to the Department of Fair Trading.

Robert has called you to a meeting where he wants to negotiate your proposed solutions to address the two situations. You need to be ready to discuss your solutions, respond to questions and consider alternative solutions from Robert.

Robert also wants to discuss your overall performance on your skills to maintain relationships with your business contacts. You must use this time to ask for his guidance on how you could have better handled your business relationships.

Instructions for Participants

Participant 1: You will play the role of the Regional Business Development Officer at Ace Finance.

Read the scenario above.

Before the role-play meeting

To prepare for this meeting, please provide the participant role-playing Robert, the owner/manager at Ace Finance with a copy of the role-play scenario.

This will allow them to prepare and contribute to the meeting.

During the role-play meeting

This role-play is a discussion between you and Robert the owner/manager at Ace Finance. In the role play you must:

- a. negotiate solutions to identified situations
- b. discuss the quality of your relationships with business contacts by giving one (1) example of what you did well and one (1) example of where to improve your skills
- c. ask questions to confirm your understanding about Robert's feedback on the problem and the quality of your relationships
- d. use persuasive language and non-verbal cues to achieve an agreeable outcome for both parties.

Following the role-play meeting:

- upload the recording to the LMS for marking

Participant 2 Instructions

You will play the role of Robert, the owner/manager at Ace Finance.

Before the role-play meeting

Familiarise yourself with role-play scenario.

Scenario

Consider the following situations:

1. A person with a disability is a new business contact who attended the financial literacy training and has now lodged a formal complaint about the venue not having a ramp. He says that providing wheelchair access is mandatory in all public spaces and is outraged you selected this venue knowing his disability. He is highly dissatisfied with Ace Finance and his treatment as a fee-paying client.
2. He is threatening to report Ace Finance to the Department of Fair Trading.

Robert has called you to a meeting where he wants to negotiate your proposed solutions to address the two situations. You need to be ready to discuss your solutions, respond to questions and consider alternative solutions from Robert.

Robert also wants to discuss your overall performance on your skills to maintain relationships with your business contacts. You must use this time to ask for his guidance on how you could have better handled your business relationships

During the role-play meeting

You will need to ask the student to explain his proposed solutions to the problem and provide feedback. This is a discussion where the student is expected to use problem-solving to negotiate a solution to the identified situation and achieve a mutually acceptable outcome.

During the meeting you must ask the following questions:

1. 'Considering the client's dissatisfaction and the potential report to the Department of Fair Trading, what immediate actions are being taken to address this concern and what steps can we take to prevent similar grievances in the future?'
2. 'Considering your recent interactions with business contacts, where do you see opportunities for improvement in building and maintaining relationships? Are there specific areas or strategies you believe could enhance our overall approach to client satisfaction and engagement?'

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

During the meeting, the student must address all elements of the Observation Checklist below.

Assessor Marking Guide

This is a discussion where the student is expected to use problem-solving to negotiate a solution to the identified situation and achieve a mutually acceptable outcome based on the scenario.

Observation Checklist Criteria

The student must:

used problem solving techniques to negotiate solutions to the two identified situations (complaint about wheel-chair access and threat to report to Department of Fair Trading)

For example:

- Active listening.
- Clearly identify the key problems presented by the client.
- Engaged in open discussion with Rober to generate potential solutions to address both the immediate concerns and prevent future occurrences.

participated in discussion, questioning, listening and exchanging ideas and views

For example:

- Actively contributed to the discussion by expressing their thoughts, concerns, and proposed solutions to address the client's complaints.
- Used open-ended questions to encourage Robert to share his perspectives and concerns.
- Actively listened by giving their full attention to Robert as he was speaking.

- Encouraged a collaborative exchange of ideas by creating an open and non-judgmental atmosphere.
- Acknowledged and validated the contributions and perspectives of Robert.
- Demonstrated a willingness to consider and incorporate **Robert's** ideas into the proposed solutions.

used active listening and questioning techniques to confirm understanding

For example:

- Maintained eye contact, nodding, and other non-verbal cues to signal they were fully engaged in the conversation.
- Repeated key points or paraphrasing what Robert was saying to confirm their understanding and to show that they were actively processing the information.
- Used open-ended questions to encourage detailed responses.
- Asked reflective questions that prompt deeper thinking and encourage Robert to elaborate on his thoughts and expectations.

used appropriate communication to suit the purpose of the meeting and audience (manager)

For example:

- Maintained a professional and respectful tone throughout the meeting.
- Used language that aligns with the corporate culture of Ace Finance.
- Clearly articulated points and proposals, avoiding unnecessary jargon or overly complex language.
- Ensured communication was concise, focusing on the key issues and solutions.
- Adjusted communication approach based on the feedback and cues you receive from Robert.

used persuasive language and non-verbal features to achieve mutually acceptable outcomes

For example:

- Used clear and concise language to articulate their proposed solutions
- Emphasised how the proposed solutions contribute to the company's commitment to inclusivity, client satisfaction, and compliance with regulations.
- Framed their messages positively, focusing on what can be done to rectify the situation rather than dwelling solely on the problems
- Used positive non-verbal cues such as maintaining good posture, making appropriate gestures, and displaying a confident demeanor.
- Used persuasive language to reassure Robert that the proposed solutions were thorough and well-considered.

sought opportunities to improve own skills and identify areas for professional development in building business relationships

For example:

- Acknowledging the importance of continuous improvement by expressing a willingness to reflect on past experiences and learn from them.
- Demonstrating a receptive attitude toward feedback.
- Encouraging Robert to provide feedback on your handling of the situations and the proposed solutions
- Seeking insights into areas where improvement is needed and asking about any strategies or approaches that would have been more effective.
- Directly asked Robert for advice on how to navigate similar situations in the future.

conversed for maximum ten (10) minutes.

Congratulations you have reached the end of this Assessment!

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