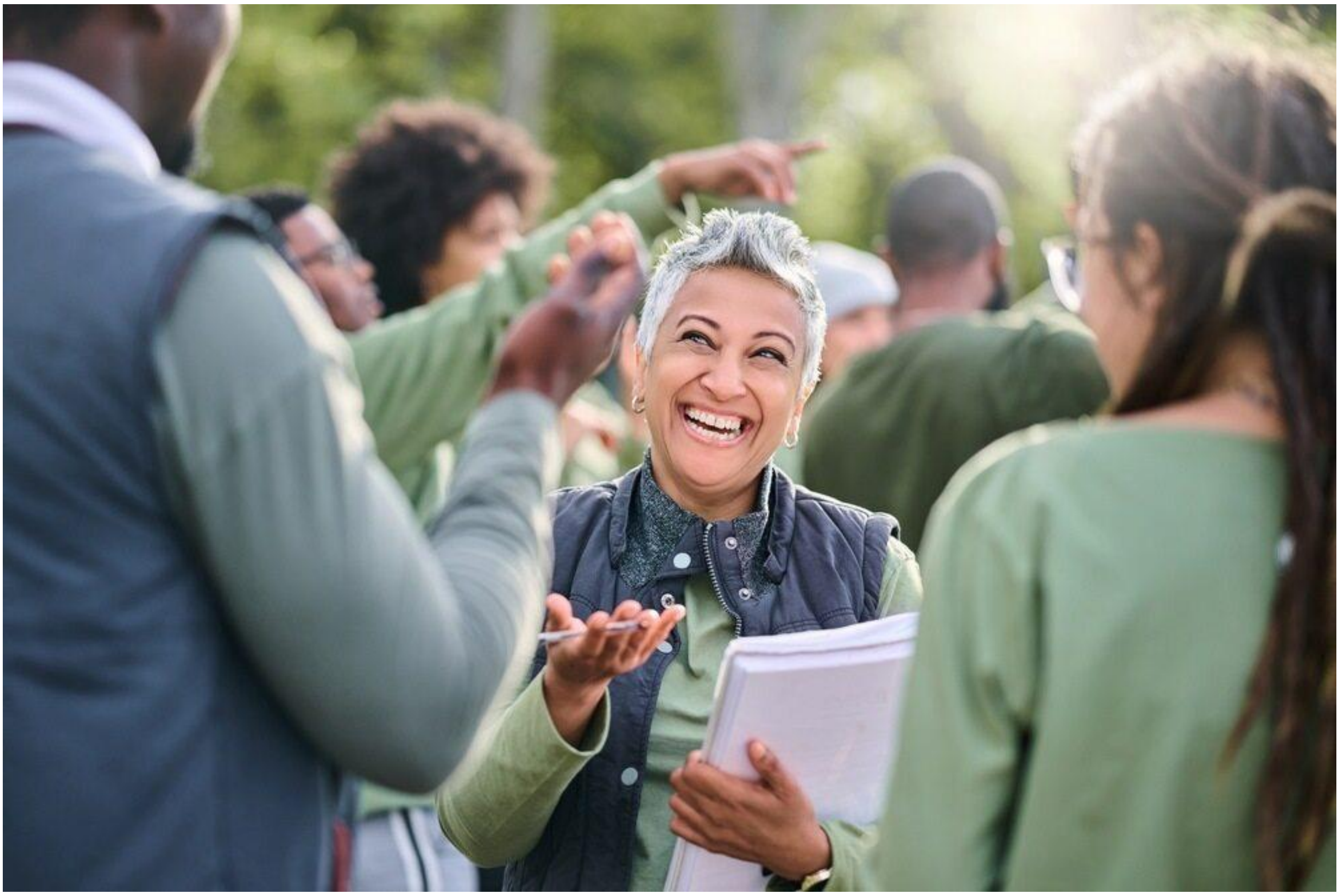
Colab



BSBCMM511 ASSESSOR GUIDE

Communicate with influence

Assessment 3 of 5

Project/ Case Study

Version 1.0

Assessment Instructions

Task overview

This assessment task is divided into two parts.

- In Part A, you will prepare for a meeting following organisational guidelines.
- In Part B, you will lead and finalise the meeting you have prepared for.

Read each question carefully before responding.

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.

Introduction

To be assessed as competent for this unit of competency, you must demonstrate skills and knowledge to facilitate and apply communication strategies in the workplace within any industry.

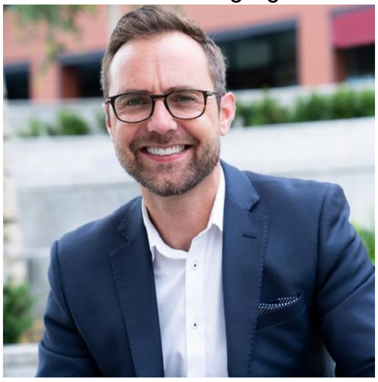
Instructions

To complete this assessment, you will need:

- Your learning materials.
- A computer, the Internet, and a web browser.
- Microsoft Word or other equivalent software.
- Access to the following documents:
  - IM003 Communication Policy & Procedures
  - TM001 Email Template
  - TM006 Meeting Agenda Template.

Refer to the presentation you delivered in the previous assessment task, and then read the following phone message left on your work phone.

Part A: Prepare for a meeting following organisational guidelines

Gavin Stead – Managing Director 	Hi Peyton. Now that you have delivered the presentation successfully, I would like you to schedule a meeting with the Sales and Marketing team regarding the outcomes of the presentation so you can schedule actions based on the outcomes. In the meeting, you should provide a brief overview of the three strategies you presented, your recommendation, and the presentation's outcome, and then discuss actions with your team. Thanks, Gavin.

Steps

Based on the phone message, you must prepare for the meeting by following the 'Meeting preparation' procedure in the Communication Policy and Procedures.

1. In a separate document, summarise the key procedures for preparing, undertaking, and finalising a meeting as per CBSA's Communication Policy & Procedures. Save it with the file name 'Meeting Procedures Assessment Task 3 - your name'.
2. Develop a meeting agenda using the TM006 Meeting Agenda Template. Save it with the file name 'Agenda Assessment Task 3 - your name'. The agenda needs to:
   - identify the location, date, and time of the meeting
   - identify the attendees of the meeting
   - specify the meeting agenda items.

3. Develop meeting notes and any supporting materials you will utilise during the meeting. Save it with the file name 'Meeting Notes Assessment Task 3 - your name'. Your meeting notes should identify:
   - potential issues and problems
   - supporting arguments that you will need to make.
4. Develop an email using the TM001 Email Template to distribute the Meeting Agenda to the attendees. Save it with the file name 'Email Agenda Assessment Task 3 - your name'. The email must:
   - specify who the email is to
   - specify who the email is from
   - specify the date and time you sent the email
   - specify the subject
   - specify the meeting agenda as the attachment
   - contain a body part of the email detailing why you are sending this email
   - complete the email footer specifying the job position you are role-playing.

Submission instructions

Submit your assessment for Part A via the LMS.

Purpose of the Task

This part is designed to ensure the student can prepare for a meeting.

Guidance to Assessors About This Task

The following provides guidance on expected student answers:

1. *The student should summarise CBSA's Meeting procedures per the Communication Policy & Procedures. At a minimum, the student must specify three separate procedures for conducting a meeting: preparation, delivery, and finalisation, with a brief overview of each.*
2. *Use the following checklist to ensure that the student has developed a Meeting Agenda to meet the requirements:*

Meeting Agenda
The student must use the Meeting Agenda Template.
The student must specify a location, date, and time for the meeting.
The student must identify the meeting attendees, and Sales & Marketing department employees (Kai Munro, Asa Russo).
The student must specify the meeting agenda items. At a minimum, the student should specify the Marketing strategies and the Presentation outcome.

3. *Students must develop any supporting materials they will use during the presentation. At a minimum, they should use a handout based on the presentation they have previously developed that contains the three marketing strategies.*
4. *Use the following checklist to ensure that the student has developed an email to the requirements:*

Meeting Agenda
The student must use the Email Template.
The student must specify who the email is [Kai Munro, Asa Russo].
The student must specify who the email is from [themselves].
The student must specify the date and time they sent the email.
The student must specify a relevant subject [Marketing Strategy Meeting, for example].
The student must specify the Meeting Agenda as the attachment.
The student must specify the body of the email detailing why they are sending this email [at a minimum, organising a meeting to discuss upcoming marketing strategies].
The student must complete the email footer specifying the job position they are role-playing [Sales & Marketing Manager].

Assessment marking criteria: Part A

Assessor instructions: All sections/questions 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 unsatisfactory (U) and requires resubmission S U

1	Create a document outlining the key elements of the organisation's Communication Policy and Procedures? This includes: ☐ *Specifying and providing a brief overview of the Meeting Preparation procedure, including:* ▪ *meeting objectives must be identified* ▪ *the audience must be identified* ▪ *time and location must be determined, including location availability* ▪ *meeting agenda items must be determined and circulated to all attendees* ▪ *any additional resources or materials must be acquired/developed.* ☐ *Specifying and providing a brief overview of the Meeting Delivery procedure, including:* ▪ *Providing an introduction to the meeting.* ▪ *Taking attendance.* ▪ *Addressing agenda items.* ▪ *Discussion and agreement on planned outcomes.* ▪ *Providing a closing to the meeting.* ▪ *Showing respect to all attendees throughout. For example: not speaking over others, ensuring all attendees act ethically in line with the Code of Ethics, ensuring attendees respond to questions openly and with honesty, managing disagreements, keeping negotiations focused on key issues, etc.* ☐ *Specifying and providing a brief overview of the Meeting Finalisation procedure, including:* ▪ *documenting the meeting using the appropriate meeting minutes template* ▪ *distributing completed meeting minutes to all attendees* ▪ *uploading meeting minutes to the company digital storage system in line with Document Management Policy and Procedures* following up with attendees on any assignments.	☐	☐

2	Develop a meeting agenda using the appropriate Meeting Agenda Template? This includes: ☐ *Specifying the location, date, and time at which the meeting is to take place.* ☐ *Identifying the personnel required to attend the meeting – Kai Munro, Asa Russo, Peyton Hughes.* ☐ *Outlining the items to be discussed throughout the meeting, including:* ▪ *overview of marketing presentation* ▪ *marketing recommendations* ▪ *presentation outcome* ▪ *actions to be completed based on the outcome.*	☐	☐
3	Develop meeting notes and any other supporting materials to be used throughout the meeting? At a minimum, this includes: ☐ *Specification and details surrounding potential issues and problems. For example, tasks required may need more input from other teams, specialist knowledge required, staff may not be happy with tasks assigned to them, etc.* ☐ *Outlining any supporting arguments that may be required. For example, a handout detailing their recommendations and all supporting arguments from their presentation.*	☐	☐
4	Compose an email for the purpose of distributing the completed Meeting Agenda to attendees? This includes: ☐ *using the Email Template provided on the CBSA website* ☐ *specifying that the email is addressed to Kai Munro and Asa Russo* ☐ *specifying that the email is from Peyton Hughes* ☐ *including an appropriate subject, such as 'Marketing Team Strategy Meeting', or similar* ☐ *identifying the Meeting Agenda as an attachment* ☐ *clear and concise email body explaining the purpose of the email* ☐ *Correct CBSA email footer specifying, at a minimum, that the sender is Peyton Hughes, and their position is Sales & Marketing Manager.*	☐	☐

Part B: Lead and finalise the meeting you have prepared for

Additional resources and supporting documents

To complete this assessment, you will need:

- Your learning materials.
- A computer, the Internet, and a web browser.
- Microsoft Word or other equivalent software.
- Access to the following documents:
    - TM007 Meeting Minutes Template
    - TM001 Email Template

Read the following email and then complete the tasks that follow.

To:	Peyton Hughes (Peyton.hughes@cbsa.com.au)
From:	Gavin Stead (gavin.stead@cbsa.com.au)
Date/time:	Wednesday 4:35 p.m.
Subject:	Upcoming Meeting

Good afternoon Peyton,

Thanks for organising the meeting in regard to the marketing strategies.

I look forward to hearing how the meeting goes and what the outcomes of the meeting are.

Thanks once again.

Kind Regards,
Gavin Stead
Managing Director
300 Fictional Way, Sydney, NSW 2000
Phone: 1800 111 222
www.cbsa.com.au

CBSA
COMPLETE BUSINESS SOLUTIONS AUSTRALIA

Steps

Based on the email, undertake and finalise the meeting following the meeting procedures detailed in the Communication Policy and Procedures.

You will participate in a role/play meeting with two or more students who will role-play the meeting attendees, recording your meeting for assessment.

Before the meeting:

Assign roles of the Sales & Marketing Team (Kai Munro and Asa Russo) to your role play partners.

Tell your role play partners they will need to respond professional during the meeting, and be prepared to ask questions and seek clarification about your presentation. You will also need them to challenge the strategies you outline to help you display your negotiating skills.

You must:

1. Lead the meeting as per the Meeting Agenda and use the Meeting delivery procedures, including:
   - using the meeting agenda as a guide to delivering the meeting
   - varying communication and adapting to feedback from attendees so that they are encouraged to participate
   - using active listening to seek attendees' input to achieve a balanced exchange of views
   - acknowledge any differences of opinion and examine options to ensure common ground and compromise are sought
   - respond to any question openly and honestly
   - ensure negations remain focused on key issues
   - ensure outcomes are agreed upon by the attendees.
2. Document the meeting outcomes using the TM007 Meeting Minutes Template. Save it with the file name 'Meeting Minutes Assessment Task 3 - your name'. The minutes must:
   - specify the location, date, and time of the meeting
   - specify the attendees and any absences
   - specify the agenda items of the meeting
   - specify the action items of the meeting, including who is responsible for the action, the deadline, and its current status
3. Develop an email using the TM001 Email Template to distribute the Meeting Minutes to the meeting attendees. Save it with the file name 'Email Meeting Minutes Assessment Task 3 - your name'. The email must:
   - specify who the email is to
   - specify who the email is from
   - specify the date and time you sent the email
   - specify the subject
   - specify the meeting minutes as the attachment
   - contain a body part of the email detailing why you are sending this email
   - complete the email footer specifying the job position you are role-playing

Reasonable adjustment

If you are unable to find a participant to play the role of the Sales & Marketing Team (Kai Munro and Asa Russo), please advise your trainer, who will discuss options to complete this task.

Resources you need

- A device with recording capability (audio and video)
- Internet access
- One (1) participant for your

Role play instructions

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.

The role-play/presentation g must include at least number 3 participant/s, must not exceed 5 minutes in duration and must address all elements below.

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 their name and job title to inform consent.

"This session/presentation is being recorded for assessment purposes for my course with Swinburne Open Education. This session will be recorded and submitted through my course online learning

platform to my assessor for grading. All participant/s in this session indicate their consent to be included in this recording by stating their name and job title." The time taken to capture consent at the start of the recording does not count towards the recording time limit. Include this recording as part of your assessment submission.

Purpose of the Task

This part is designed to ensure that the student can lead a meeting and document the meeting outcomes.

Guidance to Assessors About This Task

The following provides guidance on expected student answers:

The assessor may need to facilitate additional students to act as the audience for the student's meeting. This presentation is to be recorded via video-conferencing software.

1. *The assessor should use the following checklist to ensure that the student has led the meeting successfully:*

Meeting
The student must follow the Meeting Agenda in leading the meeting.
The student must hand out meeting support materials.
The student must use active listening to seek attendee input to achieve a balanced exchange of views once the presentation has concluded.
The student must acknowledge differences of opinion and encourage the rigorous examination of all options.
The student must seek mutually beneficial solutions by establishing areas of common ground and potential compromise.
The student must keep negotiations focused on key issues and move forward toward a final resolution.
The student must respond to questions openly, honestly, and in accordance with the organisation's Code of Ethics.
The student and attendees must agree on meeting outcomes to actions.

2. *Use the following checklist to ensure that the student has documented the meeting correctly:*

Meeting Minutes
The student must use the Meeting Minutes Template.
The student must specify the location, date, and time of the meeting.
The student must specify the attendees and any absences.

The student must specify the agenda items of the meeting.
The student must specify the outcomes of the meeting, including the actions to be taken, who is responsible for the actions, their expected completion date, and their current status.

3. *Use the following checklist to ensure that the student has distributed the meeting minutes by email successfully:*

Email
The student must use the Email Template.
The student must specify who the email is to (Kai Munro, Asa Russo).
The student must specify who the email is from (themselves).
The student must specify the date and time they sent the email.
The student must specify a relevant subject (Marketing Strategy Meeting Minutes, for example).
The student must specify the Meeting Minutes as the attachment.
The student must specify the body of the email detailing why they are sending this email (at a minimum, to distribute the meeting minutes recently attended).
The student must complete the email footer specifying the job position they are role-playing (Sales & Marketing Manager).

Assessment marking criteria: Part B:

During the demonstration of skills, the student satisfactorily facilitated a discussion and debate on ideas with team members and:

	The evidence submitted demonstrates that the student has satisfactorily (S) covered the following criteria or the evidence is unsatisfactory (U) and requires resubmission	S	U
1	Participate in and lead the meeting in line with the Meeting Agenda developed in Part A and the organisation's Communication Policy and Procedures? This includes: ☐ *Following the meeting agenda template, discuss items in order. For example, introduction, presentation overview, recommendations, presentation outcome, etc.* ☐ *Using appropriate and effective communication techniques. For example: include speaking clearly and concisely, using professional business-appropriate language, not speaking over others or interrupting, etc.* ☐ *Using active listening techniques to elicit opinions and facilitate open discussion of meeting topics. For example: asking open questions, making eye contact, nodding, paraphrasing, positive affirmations, facing the speaker, etc.* ☐ *Adapting communication techniques in response to attendees' feedback to encourage them to participate. For example: asking leading questions, asking what they think of each other's suggestions, using supporting documents to further explain a point, etc.* ☐ *Responding to questions openly and honestly.* ☐ *Ensuring negotiations remain focused on key issues. For example: where discussion moves off-topic, bringing the issue back to the discussion, asking attendees to stay focused, etc.* ☐ *Ensuring an agreeable outcome is achieved. For example: confirming the plan of action, summarising decisions that have been made, asking 'does everyone understand?' or similar, etc.*	☐	☐

2	Document meeting outcomes using the appropriate Meeting Minutes template? This includes: ☐ *Specifying the location, date, and time the meeting took place.* ☐ *Listing the attendees as Kai Munro, Asa Russo, and Peyton Hughes.* ☐ *Listing the agenda items of the meeting as per the Meeting Agenda developed in Part A.* ☐ *Outlining the action items based on the negotiations and outcomes achieved – including who is responsible for the action, the deadline by which completion is required, and its current status. For example, the development of social media advertising to be completed by Asa R by 28/01/2021, etc.*	☐	☐
3	Compose an email for the purpose of distributing the completed Meeting Minutes to attendees? This includes: ☐ *Using the Email Template provided on the CBSA website.* ☐ *Specifying that the email is addressed to Kai Munro and Asa Russo.* ☐ *Specifying that the email is from Peyton Hughes.* ☐ *Including an appropriate subject, such as 'Marketing Team Strategy Meeting Minutes', or similar.* ☐ *Identifying the Meeting Minutes as an attachment.* ☐ *Clear and concise email body explaining the purpose of the email.* ☐ *Correct CBSA email footer specifying, at a minimum, that the sender is Peyton Hughes, and their position is Sales & Marketing Manager.*	☐	☐

Assessment Checklist

Students must have completed the following in the spaces provided in this assessment.

Part A	
1. Meeting Procedure	☐
2. Meeting Agenda	☒
3. Meeting notes and supporting materials	☐
4. Email	☐
Part B	
1. Meeting Agenda	☐
2. Meeting minutes	☐
3. Email	☐
4. Recording	☐

Congratulations you have reached the end of Assessment 3