



BSBTEC404

ASSESSOR GUIDE

Use digital technologies to collaborate in a work environment

Assessment 2 of 2

Case Study

Assessment Instructions

Task overview

This assessment is divided into four (4) tasks. Read each question/instruction carefully before attempting each task.

Additional resources and supporting documents:

To complete this assessment, you will need:

- Ace Finance Technology, Collaboration and Communication Policy and Procedure
- Ace Finance Corporate Marketing Plan
- Ace Finances Policies and Procedures

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.

SCENARIO - email



Hi there,

Ace Finance intends to increase its regional market share by attracting and retaining clients who want a more holistic finance and accounting service that includes training and professional development.

The executive team have conducted a strategic review. We need you to identify and incorporate collaborative digital technologies to commence online training workshops with clients. The business currently uses Microsoft Outlook and Skype to collaborate. This has been a problem, as this limits the opportunity to collaborate and communicate effectively between staff and clients.

You will be required to determine which technologies would be best to effectively support the business in its new venture of online training and ensure all staff are fully equipped to utilize these technologies to their maximum capacity.

Prior to conducting client training, you will need to ensure, through the following four (4) tasks, you will:

- Collect information and review existing programs used at Ace Finance.
- Research and identify other programs/technologies.
- Prepare a business case to get approval for the new program/technology.
- Put together a plan to roll out the new program/technology.
- Communicate and promote the plan to Ace Finance staff (Following Ace Technology, Collaboration and Communication Policy and Procedure).
- Follow the plan and roll out the new tech, ensuring to follow Ace Finance policies and procedures.
- Organize training for the Ace Finance team.



Warm regards,
Andrew | Manager
andrew@ace.finance

Task 1 – Review current technologies

Review *Ace Finance Marketing Plan* along with the *Technology, Collaboration and Communication Policy and Procedure*. Conduct a SWOT analysis using the supplied template.

Complete this task based on your review of the following, against organisational strategies and objectives:

1. Current collaborative ways of working
2. Performance of current collaboration tools

Assessor Marking Guide

Each analysis will vary depending on the technology selected. However, it must include:

- Strengths – A list or description of what is working well.
- Weakness - What is not working as well as it could.
- Opportunities – List or description of what needs to be improved or changes.
- Threats – Explanation of any threats to the customer or technological threats.

The following table lists topics that students would be expected to include in their answer:

Task 1 SWOT Analysis	
Strengths	Weaknesses
<p>The following are acceptable responses:</p> <p>Skype</p> <ul style="list-style-type: none"> • User-friendly interface • Many free features • Don't need to download the program • Don't need to create an account • Group collaboration • can be used to text message, chat, video call or voice call • can exchange both video and text-based messages online and to exchange documents online • Subscription model <p>Outlook</p> <ul style="list-style-type: none"> • Sits within Office suite • Linked to other apps in the 365 suite • Emails can be grouped into conversations • High storage space • Easy access across various devices • Scans for viruses and unsafe link 	<p>The following are acceptable responses:</p> <p>Skype</p> <ul style="list-style-type: none"> • different permissions/duration of functions between paid and free account. • software sits outside Microsoft office suite. • requires additional plan and access information to access. • Security issues - Many use it for fraudulent transaction and underhand businesses • <p>Outlook</p> <ul style="list-style-type: none"> • Cost associated as part of 365 suite • Doesn't allow for video calling • Emails can be lost in junk mail • Lack of integration for related functions such as calendar and contacts

Opportunities	Threats
<p>The following are acceptable responses:</p> <p>Skype</p> <ul style="list-style-type: none"> • HD video calling • call recording and live subtitles • easily share presentations through screensharing • smart messaging - all in one platform <p>Outlook</p> <ul style="list-style-type: none"> • Integration options with other Office 365 such as SharePoint and Teams • Email and calendar in the same place providing the opportunity for scheduling and communicating the schedule at one time 	<p>The following are acceptable responses:</p> <p>Skype</p> <ul style="list-style-type: none"> • loss of contact details in transfer of technologies • Data loss, as current data cannot be moved to new system • Instant messaging applications pose serious security threats to users. There needs to be a strong protection feature which can be costly. <p>Outlook</p> <ul style="list-style-type: none"> • Unreliable as emails can go to spam or junk folder • Data loss, as current data cannot be moved to new system • loss of contact details in transfer of technologies

Task 2 – Identify alternative technologies

Part A

Research and discuss two (2) alternative technologies, GoToMeeting and ZOOM, that will better support Ace Finance to meet its client’s needs. Identify sources of technical information you can access to help make a decision on which would be best option.

Assessor Marking Guide

Student’s responses will vary however students must list 2 collaborative technologies and provide details of where they sourced information for each.

Sources of information must be creditable and relevant to the technology.

Example:

Task 2 Part A	
Technology 1 - GoToMeeting	Technology 2 - ZOOM
<p>Brief overview and main features <i>Source: https://www.gotomeeting.com/</i></p> <p><i>GoToMeeting is a web-hosted service created and marketed by LogMeIn. It is an online meeting, desktop sharing, and video conferencing software package that enables the user to meet with other computer users, customers, clients or colleagues via the Internet in real time.</i></p> <p><i>Main features are:</i></p> <ul style="list-style-type: none"> • <i>Screen sharing</i> • <i>Conference calling</i> • <i>Mobile calling</i> • <i>Virtual Whiteboard</i> • <i>Built-In Audio</i> • <i>Meeting Scheduler</i> • <i>Hand Over Control</i> • <i>One-Click Recording</i> • <i>Join via Mobile Options</i> • <i>Desktop/Application Sharing</i> • <i>Personal Meeting Room</i> • <i>Meeting recording and transcription</i> 	<p>Brief overview and main features <i>Source: https://zoom.us/</i></p> <p><i>Zoom is a videotelephony software program developed by Zoom Video Communications.</i></p> <p><i>Zoom consists of:</i></p> <ul style="list-style-type: none"> • <i>Zoom Chat</i> • <i>Zoom Meetings</i> • <i>Zoom Phone</i> • <i>Zoom Developer Platform APIs & SDKs</i> • <i>Zoom for Home</i> • <i>OnZoom</i> • <i>Zoom App Marketplace</i> • <i>Zoom Webinars</i> • <i>Zoom Rooms</i> • <i>Zoom for Healthcare</i> <p><i>Features include:</i></p> <ul style="list-style-type: none"> • <i>HD video, audio, collaboration and chat</i> • <i>Instant communication across real time video and phone</i> • <i>Expanding traditional schools in the cloud</i> • <i>Integrations and bots to use with Zoom</i> • <i>People can join a meeting for free, but the meeting host has to pay a monthly subscription unless they agree to be restricted to the features of a free plan (like a call no longer than 40 minutes)</i>

Part B

Based on your research, make a formal recommendation for the use of **ZOOM**, to the CEO of Ace Finance. Use the business case template to record your findings and make your recommendations.

Assessor Marking Guide

Students are required to follow the Ace Finance Style Guide to format their business case.

Task 2 Part B
Executive Summary <i>This section must contain a summary of the main points of the business case. This section must cover all the important information covered in the business case and provide sufficient context to your reader. It will include:</i> <ul style="list-style-type: none">• <i>The reason for the business case</i>• <i>A mention of the digital technologies currently being used and their limitations</i>• <i>Identifying Zoom as the recommended digital technology</i>
Finance <i>Must include two subsections:</i> <ul style="list-style-type: none">- <i>Financial appraisal</i><ul style="list-style-type: none">o <i>The student will compare the cost of Zoom and other digital technologies</i>- <i>Project / budget risks</i><ul style="list-style-type: none">o <i>The student needs to identify if there are any financial risks with the move to Zoom</i>
Project Definition <i>This is the largest part of the business case. This section must contain details relevant to the project sponsor, stakeholders, and project team. This section must also answer the why, what, and how questions about the project.</i> <i>Here the business case must:</i> <ul style="list-style-type: none">- <i>Identify available digital technologies by accessing relevant sources of information,</i>- <i>Highlight that the student has (or has considered the need to) seek assistance from specialist advisors, where required.</i>- <i>Outline the assessment of existing collaborative work against available and existing digital technologies.</i>- <i>Identify opportunities and priorities for digital technology in collaborative work.</i>- <i>Include details of Ace Finance's objectives, purchasing strategy and market assessment (commercial strategy).</i>- <i>Identify any associated risks.</i> <i>Refer to the ACE Finance Style Guide for further formatting guidance.</i> <i>The format of the business case must be set out in the following subsections with the following information in each:</i> <ul style="list-style-type: none">• <i>Background information</i><ul style="list-style-type: none">o <i>Reason for the project including the problems it attempts to address and opportunities for moving to Zoom.</i>o <i>A SWOT analysis could be included but is not essential.</i>• <i>Business objective</i><ul style="list-style-type: none">o <i>This will include the aim of the project.</i>o <i>What the requirements are to accomplish the implementation of Zoom.</i>• <i>Benefits and limitations</i><ul style="list-style-type: none">o <i>This section will discuss how implementing Zoom will improve efficiency, productivity and overall work conditions.</i>• <i>Option identification and selection</i><ul style="list-style-type: none">o <i>Outline of other technologies considered and information on each.</i>

- Scope, Impact and Interdependencies
 - include detailed information on what needs to be done to move the organization across to Zoom.
 - Acknowledgment that this is not a standalone project, and it could affect or be affected by other projects.
- Outline plan
 - include an implementation schedule and timeline for the rollout of Zoom.
- Market assessment
 - include details of the relevance of moving to Zoom in the organisation's current environment.
- Risk assessment
 - include the risks of both staying using current technology and moving to Zoom.
 - Needs to also include how these risks will be dealt with.
- Project approach
 - an outline of the tasks involved with the implementation of Zoom and how these tasks will be accomplished.
- Purchasing Strategy
 - details of the financial requirements of purchasing Zoom.

Project Organisation

Students must describe how the project is set up, including the governance of the project and how progress will be reported.

- Project governance
 - This will outline the decision-making process, including a hierarchy of levels of decision making.
- Progress reporting
 - This will include details of how and when project progress updates will be provided to the stakeholders/organisation.

Task 3 – Present your findings

Present a two (2) minute summary of your business case to the CEO about your finding and recommendation for Ace Finance. Be prepared to answer questions on how you came to your decision.

You will need to book an appointment with your trainer to present your business case.

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Each student must present their business case using appropriate verbal language that is clear and professional. They must use formal language appropriate for presenting to the CEO by using correct pronunciation and not using contractions, and slang.

Engage the student with questions to confirm how they came to their decision.

Observation Checklist		
This observation checklist is to be completed by the observer and marked Satisfactory (S) or Not Satisfactory (NS) for each stage of the development of the business plan.		
The student was observed demonstrating the following during their presentation		S / NS
01	Communicated key features of the business plan	
	<ul style="list-style-type: none"> • Executive summary • Finance appraisal • Project / Budget Risks • Background information • Business objective • Benefits and limitations • Option identification and selection • Scope, Impact and Interdependencies • Outline plan • Market assessment • Risk assessment • Project approach • Purchasing Strategy • Project governance • Progress reporting 	
02	Communicated effectively with others	
	<ul style="list-style-type: none"> • Appropriate language • Clearly articulated information • Used appropriate tone and body language • The student was persuasive 	
03	Listened to comments and feedback	
	<ul style="list-style-type: none"> • Responded appropriately to questions 	

Task 4 - Implement digital technologies

Part A

Your chosen technology has been approved by the Executive Team to roll out within Ace Finance. You are now, therefore, required to implement your chosen digital technology within the business.

Create an implementation plan to introduce and create the new collaborative technology you have selected, in line with the Technology, Collaboration and Communication Policy and Procedure. Your plan should address matters such as the goal of the change, the resources required, an implementation/ training schedule, the assignment of responsibilities and a contingency plan.

Assessor Marking Guide

Each plan will vary however must address; goals for the change of technology, assigned responsibilities, implementation schedule, a list of required resources, date of implementation and a contingency plan.

Part B

To communicate this with the stakeholders, you are required to prepare two (2) emails using the templates below.

This information will be delivered to the entire business, including the Executive Team. It is important that you ensure your tone and language is appropriate for this audience and your information is delivered in a detailed and clear manner.

The first email must be addressed to your team and outline the details of your implementation plan, including:

- the key features of your selected digital technology
- the time frame allotted for the roll out
- training plan and schedule
- who will be leading this project?
- when and how training will be conducted.

The second email should be addressed to **the company's external stakeholders** and whilst it must include the same information, the tone and language of the email should be adjusted to reflect the external nature of the communication.

Assessor Guide

Each email must include information that aligns to the student's implementation plan and cover each of the above points. The language and presentation of the emails must be appropriate to the audience.

Email Template

To:	
From:	
Date:	
Subject:	

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Email Template

To:	
From:	
Date:	
Subject:	

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Part C

As part of the implementation of your chosen digital technology, you conduct training. To do this effectively, you need to develop a training resource in the form of a PowerPoint presentation or similar (maximum 10 slides, including title page) which outlines the following:

- What is the chosen technology?
- Why it has been selected (i.e., benefits, why they are changing)
- Features of the technology (i.e., does it have a video function, can messages be sent between users, can files be shared, etc)
- Outline what is to be included in the training session, for example:
 - How it is expected to be used – aligning to the purpose of the technology
 - How will they access the new technology?
 - How to use the features such as: video call, internal chat function, screensharing, file sharing, collaborating on documents, how to add additional participants to a chat, how to mute and unmute, how to set up a video call and share a meeting link, including what not to do (if anything).
 - Trouble shooting for example, audio and video settings.
 - When it will be implemented by the IT team (i.e., they will install it over the up-and-coming public holiday/over the weekend- less disturbance to current business running's).
- Where to go for further information on using digital technologies for collaborating and communicating (i.e., the Technology, Collaboration and Communication Policy and Procedure).

Assessor Marking Guide

Student responses may vary but must demonstrate the student's ability to:

- create a training program that is consistent with the business objectives which include:
 - increasing its regional market share
 - attracting and retaining clients who want a more holistic finance and accounting service that included training and professional development
- communicates the key features of their chosen digital technology.
 - The key features of Zoom include:
 - *HD video, audio, collaboration and chat*
 - *Instant communication across real time video and phone*
 - *Expanding traditional schools in the cloud*
 - *Integrations and bots to use with Zoom*
 - *People can join a meeting for free, but the meeting host has to pay a monthly subscription unless they agree to be restricted to the features of a free plan (like a call no longer than 40 minutes)*
- Develop resources appropriate to the identified audience.
 - The presentation will be done in PowerPoint or similar.
 - Copy of training notes could be provided as a reference resource.

Part D

As part of your research, survey 5 people on the benefits of using Teams, Zoom or similar technology for communicating information as opposed to the emails and Skype methods that ACE were previously using.

Assessor Marking Guide

Responses will vary however must reflect the feedback of 5 people who have used digital technology to collaborate. Feedback collected must include a comparison to emails and Skype. Survey is not limited to but appropriately include the following examples of pros and cons.

Pros:

- ✓ Easier collaboration
- ✓ More productive
- ✓ Create working groups
- ✓ Better for clients
- ✓ Remote access
- ✓ Save time in transport
- ✓ Family friendly

Cons:

- ✗ Costs
- ✗ Learning new technology
- ✗ Technology requirements
- ✗ Limitation on some basic packages
- ✗ No NBN - ADSL speed
- ✗ Fighting with family for band width

Congratulations you have reached the end of this Assessment!

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