



**BSBPMG535**

**ASSESSOR GUIDE**

## Manage project information and communication

Assessment 2 of 5

**Project**

## Assessment instructions

### Task overview

This unit requires you to manage project information on at least two occasions.

**Occasion 1** is covered in the following assessment tasks:

- Assessment task 2 – Develop a briefing for the budget seminar project team
- Assessment task 3 – Analyse communication and information system and Resolve communication and information issue
- Assessment task 4 – Develop an evaluation report

**Occasion 2** is covered in the following assessment task:

- Assessment task 5

**This assessment task 2 requires you to:**

- **Develop a briefing for the budget seminar project team**

Read the case study and complete each step.

### Additional resources and supporting documents

To complete this assessment, you will need:

- Access to learning material
- A computer and business software
- Internet access
- Project Documentation [provided]
- An example of past project management [provided]

## 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.

## Task instructions: Develop a briefing for the budget seminar project team

**Case study:** You work as Alex Lee at Complete Business Solutions Australia. In this assessment task, you will develop a briefing for the CBSA Budget Seminar project team using PowerPoint or a similar program. You must provide speaker notes to accompany the slides. Note: You will not be required to present the information to an audience.

You have received the following e-mail from Tina Hughes, Sales and Marketing Manager.



**To:** Alex Lee [alex.lee@cbsa.com.au]

**From:** Tina Hughes [tina.hughes@cbsa.com.au]

**Date/time:** Tuesday 10.30 a.m.

**Subject:** Seminar Project

**Attachments:** *Seminar Briefing.docx, Report 20XX Budget Seminar.docx*

Good morning Alex

I need your help with the Budget Seminar scheduled for August.

It is one of our most important local events. The venue is catering, and Sally has arranged presenters, but after a few mishaps last year, our CEO, Gavin Stead, has passed the project management to Marketing.

In the past, there has been some miscommunication, such as an incorrect date on the initial e-mailed invitation, ineffective tracking of RSVPs, the wrong spelling of attendees' names etc. This year we want to manage communications and information more professionally, and I would like you to take charge of this and ensure we meet our targeted numbers.

You will need to communicate the requirements of the communication management to the project team and manage the project information and communication system to ensure information is correctly gathered, stored, retrieved and analysed. As with all of our projects, you will need to recommend improvements to our systems and processes for future projects. You are responsible for developing these processes, but ultimately, I approve all systems. Also, I am the only one authorised to speak to the public and the media.

Attached you will find a briefing on the seminar and an evaluation of last year's seminar developed by one of our trainees.

I have arranged for the first meeting for the project team on Friday and have given you a half-hour time slot to go through the communications process and plan.

Kind Regards,  
Tina Hughes

Sales and Marketing Manager

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

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



### ATTACHMENTS BELOW:

- [Seminar Briefing.docx](#)

CBSA “The Budget” Seminar

**Objectives**

- Maintain client satisfaction by providing valuable information as well as opportunities to network with CBSA staff and other businesses
- Identify ten new leads for CBSA
- Target attendance: 65 guests, + 15 staff (Venue holds 80 seated café style)
- Target audience for the seminar: small business owners and senior management

**Event Details**

*Date*

Wednesday 6:00 p.m. – 8.00 p.m.

*Seminar Fee*

Complimentary for clients and their guests

*Venue*

Fairview Business Chamber

2 Fairview Way, Fairview 21XX

Contact: Lily May

E-mail: [lily.m@fbc.Com.au](mailto:lily.m@fbc.Com.au)

*Caterers*

Charlie’s

Contact: Charlene Brazza

E-mail: [charlie@charlies.com.au](mailto:charlie@charlies.com.au)

Tel: 0417 562 541

*Presentations*

Welcome address - Jago Dimovski, CEO Fairview Business Chamber

“What the budget means for the economy” Prof Henry Winter, Professor of Economics

“Challenges and opportunities for small business” Gavin Stead. CEO CBSA

*Program*

5.30 p.m.	Registrations open Drinks, nibbles and networking
6.00 p.m.	Welcome address: Jago Dimovski
6.20 p.m.	“What the budget means for the economy”, Professor Henry Winter
7.00 p.m.	“Challenges and opportunities”, Gavin Stead
7.30 p.m.	Tea/coffee and networking
8.00 p.m.	Close

**Work Breakdown**

Project Sponsor: Gavin Stead

Project Manager: Tina Hughes

Activity	Responsibility	Review dates				
Seminar logistics	Sally Pierce					
Communications planning & management	Alex Lee					
RSVPs and guest list	Alex Lee					
Marketing messaging and collateral	Adrian Russo					
Media liaison	Tina Hughes					
Website, Facebook and Twitter account updates	Adrian Russo					
IT support for the seminar	Sam Taylor					
Accounts and budget management	Trish Gibbons					
Debriefing and report on the event	Tina Hughes					
Improvement plan	Tina Hughes					

- *Report 20XX Budget Seminar.docx*

#### REPORT ON THE 20XX BUDGET SEMINAR

E-mailed invitations sent: 220

Timing and frequency: 4 weeks before; reminder sent two weeks before

Bounce rate: 5%

RSVPs: 149

Acceptances: 80 (55 clients and contacts; 25 staff and contractors)

No-shows: 20

Final Number of Attendees: 60 (including 16 staff and contractors)

#### PROMOTION:

Media	Timing and frequency	Response	Outcome
Facebook	Weekly for 4 weeks	70 likes	Unknown
Twitter	Once, 2 weeks before	80 likes, 6 re-tweets	Unknown
LinkedIn article	Once, 3 weeks before	75 likes. 20 shares	20 requests for an invitation, 5 attendees
Business Chamber newsletter invitation	4 weeks before	8 RSVPs	8 attendees

#### ISSUES:

- Wrong date on the first invitation (last year's date was left on the invitation). It was recognised by a staff member and re-sent with an apology.

- Some RSVPs rang to cancel, but the cancellations were not recorded – discovered on the evening
- Some misspellings on name tags
- No IT support at the venue. Speaker started late trying to connect to the digital projection system.
- Jago Dimovski wasn't well briefed - they spoke for too long on side issues.

#### FEEDBACK AND RECOMMENDATION

- Charlie's Catering did a superb job with the food. Recommend they are used again.
- Received ten good leads from the event
- The satisfaction survey came back with a 7.6 rating. We had a KPI of 8 or better, but this was an improvement from last year.
- Negative feedback mainly on not being able to hear the speaker at the back of the room. Recommend a microphone is provided next year.
- Getting spelling on name tags right was difficult because I could not read some of the handwriting on the list. Recommend this is keyed into Excel at the point of contact and spell-checked.

Julie Nguyen

Administration Trainee

## Steps

Read the e-mail and attachments from Tina Hughes, Sales and Marketing Manager.

Develop a **PowerPoint presentation** (or similar) that will be used to brief the project team about the requirements of the project. Add **notes** to your presentation to expand on the following information. The notes are used to expand on the information in the presentation. Tip: To add speaker notes, select notes below the slide and type your notes.

The presentation and notes must cover the following:

1. Your responsibilities and boundaries in this project [Approximate word count: 60 words]
2. Information and communication processes for the project including:
  - a) the stakeholders in the project [Approximate word count: 20 - 45 words]
  - b) target audience for the seminar [Approximate word count: 6 words]
  - c) the information needs to be communicated to each stakeholder and seminar target audience [Approximate word count: 60-70 words]
  - d) the channels you intend to use to communicate information to each group [Approximate word count: 40-50 words]
  - e) the frequency and timing of communications [Approximate word count: 100-130 words]
  - f) how the communication outputs will be measured for seminar promotional activities [Approximate word count: 50 words]
3. Recommend a project management information system and include the following information:
  - a) Listing a system [Approximate word count: one to two words]
  - b) Outlining how the system will gather, store and share information. [Approximate word count: 25-45 words]
  - c) Validating process to be used to check and ensure information is correct [Approximate word count: 10-20 words]

## Submission instructions

Submit your assessment via the LMS.

## Assessor instructions: Develop a briefing for the budget seminar project team

### Purpose of task

This task aims to assess the student's competence in planning information and communication processes that are appropriate for the project.

### Guidance to the assessor about the task

There is no submission due date for this task. Students may submit this task when they are ready.

Students must address each question in the PowerPoint slide and accompanying notes section. It is acceptable for students to respond to multiple questions at once. For example, what needs to be communicated and the channel can be answered separately or together. The important aspect is that the student addresses all criteria listed.

The presentation and notes must cover the following:

#### 1. Your responsibilities and boundaries in this project

The student must identify responsibilities and boundaries in this project from the e-mail case study. This question assesses the foundation skill of initiative and enterprise to identify responsibilities and boundaries, and they can use the same or similar wording from the e-mail extract below:

*You will need to develop and communicate the communication management plans for projects to the project team and manage the project information and communication system to ensure information is correctly gathered, stored, retrieved and analysed. As with all of our projects, you will need to recommend improvements to our systems and processes for future projects. You are responsible for developing these processes, but ultimately, I approve all systems. Also, I am the only one authorised to speak to the public and the media.*

A benchmark example is provided below:

- *Develop and communicate the communication management plans for projects to the project team*
- *Manage the project information and communication system to ensure information is correctly gathered, stored, retrieved and analysed*
- *Recommend improvements to our systems and processes for future projects.*
- *Boundaries: Tina is responsible for approving all systems. Tina is the only one authorised to speak to the public and the media.*

#### 2. Information and communication processes for the project including:

##### a) the stakeholders in the project [Approximate word count: 20-45 words]

- *Project Sponsor: Gavin Stead*
- *Project Manager: Tina Hughes*
- *Department Managers*
- *Project team [Students may identify each person responsible for the project, such as Sally Pierce, Alex Lee, Adrian Russo, Tina Hughes, Sam Taylor, and Trish Gibbons]*
- *General staff*
- *Seminar speakers [Students may identify each speaker Jago Dimovski, Prof Henry Winter, Gavin Stead]*
- *Seminar suppliers [Students may identify Fairview Business Chamber, Lily May; Caterers, Charlene Brazza, Charlie's]*

##### b) Target audience for the seminar [Approximate word count: 6 words]



*small business owners and senior management*

c) Information that needs to be communicated to stakeholders and seminar target audience (Approximate word count: 60-70 words)

- *Project Sponsor: Gavin Stead – kept informed*
- *Project Manager: Tina Hughes – responsible for approval of all systems and communications*
- *Department Managers – informed of communication systems and processes*
- *Project team – informed of communication systems and processes and project responsibilities*
- *General staff – provided with updated company information*
- *Seminar speakers – provided with a briefing about speaker requirements*
- *Venue – numbers and venue requirements*
- *Caterer – numbers and food requirements*

d) the channels you intend to use to communicate information to each group (Approximate word count: 40-50 words)

*Students must identify a channel of communication for each group. Answers will vary for each student as the communication mode varies. For example*

- *Project Sponsor: Gavin Stead – meetings and e-mails*
- *Project Manager: Tina Hughes – meetings and e-mails*
- *Department Managers – e-mails*
- *Project team – project plan, e-mails, team meetings*
- *General staff – e-mails, intranet announcements*
- *Seminar speakers – e-mails, meetings*
- *Venue – e-mail*
- *Caterer – e-mail*
- *Target audience – Facebook, Twitter, LinkedIn, business chamber newsletter, e-mails*

e) the frequency and timing of communications (Approximate word count: 100-130 words)

*The frequency and timing of promotional media are identified in the previous report on the seminar. No specific timeframes have been established. Student responses may vary, but they must provide realistic timeframes to manage the project. For example:*

- *Project Sponsor: Gavin Stead – meetings (every two weeks) and e-mails, as needed*
- *Project Manager: Tina Hughes – meetings (every week) and e-mails, as needed*
- *Department Managers – e-mails one month before the seminar*
- *Project team – project plan, e-mails, team meetings – on commencement, weekly meetings and e-mails as needed*
- *General staff – e-mails, intranet announcements – on commencement, week prior to the seminar*
- *Seminar speakers – e-mails, meetings – on commencement, two weeks prior to the seminar, one week prior to the seminar*
- *Venue – e-mail – on commencement, two weeks prior to the seminar, one week prior to the seminar*
- *Caterer – e-mail – on commencement, one week before the seminar, day before the seminar*
- *Target audience – facebook (weekly for 4 weeks), Twitter (once, 2 weeks before), LinkedIn (once, 3 weeks before), business chamber newsletter (4 weeks before)*

- f) how the communication outputs will be measured for seminar promotional activities (Approximate word count: 50 words)

*Students **must** identify measurable communication outputs. Social media responses must include the following:*

- *the reach of the communications: number of shares or clicks on social media; the number of e-mail bounces; the number of RSVPs*

*Students may identify additional quality objectives, and this can include: error rates; the number of attendees compared with the previous year; the type of attendee, including job title; the number of no-shows. Quality objectives are not compulsory.*

### 3. Recommended project management information system

Students must identify:

- a) project management information system. Student responses will vary due to the range of gathering, storage and sharing systems. Project information systems include Monday, MS Project, dropbox, Wrike, or other project management information system.
- b) Process to manage the gathering, storage and sharing of information generated by project staff

The process to manage gather, store and share information will depend on the project management information system selected in a). Examples are provided below for Monday and MS Project.

#### Monday

- all files are located on Monday
- add files
- share status (e.g. working on it)
- mark completion of tasks
- import files to tasks
- files are searchable

#### MS Project

- enter data including task name and duration using Gantt chart
- shows task dependencies
- share Microsoft project files with your team

These are two common responses. If alternative systems are identified, the Assessor must check the responses by researching the system identified in the student's responses.

- c) Validating/ensuring details are correct before the information is sent

The student must identify validating systems to ensure details are correct before the information is sent. For example, information is to be checked by the Project Communications Officer and Project Manager prior to the data being used.

Review all evidence and mark using the assessment checklist and assessment marking criteria.

## Marking criteria: Develop a briefing for the budget seminar project team

### Assessment submission checklist

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

Develop a briefing for the budget seminar project team		
1.	Powerpoint [or similar] with notes	<input type="checkbox"/>

### Assessment marking criteria

**Assessor instructions: All sections must be completed. Refer to sample answers and benchmarks.**

The evidence submitted demonstrates that the student has satisfactorily [S] covered the following criteria, or the evidence is not yet satisfactory [NYS] and requires resubmission.

MARKING CRITERIA		Satisfactory [S]	Not Yet Satisfactory [NYS]
The student submitted a PowerPoint presentation [or similar] with notes and:			
1.	Explained responsibilities and boundaries in the project	<input type="checkbox"/> S	<input type="checkbox"/> NYS
2.	Explained the information and communication processes, including:		
	a) the stakeholders in the project	<input type="checkbox"/> S	<input type="checkbox"/> NYS
	b) target audience for the seminar	<input type="checkbox"/> S	<input type="checkbox"/> NYS
	c) the information needs to be communicated to each stakeholder and seminar target audience	<input type="checkbox"/> S	<input type="checkbox"/> NYS
	d) the channels you intend to use to communicate information to each group	<input type="checkbox"/> S	<input type="checkbox"/> NYS
	e) the frequency and timing of communications	<input type="checkbox"/> S	<input type="checkbox"/> NYS
	f) how the communication outputs will be measured	<input type="checkbox"/> S	<input type="checkbox"/> NYS
3.	Recommended project information systems including:		
	a) Process to manage the gathering, storage and sharing of information generated by project staff	<input type="checkbox"/> S	<input type="checkbox"/> NYS
	b) Validating/ensuring details are correct before the information is sent	<input type="checkbox"/> S	<input type="checkbox"/> NYS

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

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