



BSBPMG535

ASSESSOR GUIDE

Manage project information and communication

Assessment 5 of 5

Project

Assessment Instructions

Task overview

BSBPMG535 Manage project information and communication requires you to manage project information on at least two occasions.

In assessment tasks 2, 3 and 4, you managed project information on one occasion.

In this assessment, task 5, you will manage project information on another occasion. You will develop stage 1 of a Customer Relationship Management System. This will require you to have a basic knowledge of CRM systems and their purpose in a business. An overview is provided, but you will need to conduct further research if you are unfamiliar with customer relationship management.

Assessment task 5 is divided into two (2) parts:

- Part A – Plan and develop a project communication plan [project]
- Part B – Develop an evaluation report [project]

Read the case study and complete each part.


Additional resources and supporting documents

To complete this assessment, you will need:

- Learning resources
- Computer and business software
- Internet access
- Project communication and information management templates [provided]

Case study

Read the following e-mail and complete the task that follows.

	To: Alex Lee [alex.lee@cbsa.com.au]
	From: Tina Hughes [tina.hughes@cbsa.com.au]
	Date/time: Wednesday 2.30 p.m.
	Subject: CRM Project Stage 1
	Attachments: Project Steering Committee.docx, Overview of CRM Systems.docx

Good afternoon Alex

Thank you for agreeing to manage the CRM Project. As you are aware, the goal of Stage 1 is to identify two alternative systems that could potentially suit the whole business and replace the various ways departments store information about clients.

As this is a whole-of-business project, liaison with each department, and a communication plan that ensures all heads of department are consulted and informed, are critical. For this reason, each department head has nominated one staff member to join the Project Steering Committee. [See attached]

In addition, Con Kafolos, our IT Manager, has offered to release Tina Yates to join you to form the project team. It is a small team, but I think the two of you have the required expertise between you for Stage 1. I have provided a brief overview of CRM systems that may be useful for you in

communicating the project's background to staff. I have attached the overview of the CRM systems to this e-mail.

Con Kafolos will need to approve the system to ensure it meets our IT security and server requirements.

As you know, I will be on leave for five weeks. Since Stage 1 has a 4-week timeline, you will have identified the two systems that seem the best fit for the business by the time I return. I look forward to receiving your project report then.

Best of luck.

Kind Regards,

Tina Hughes

Sales and Marketing Manager

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

www.cbsa.com.au



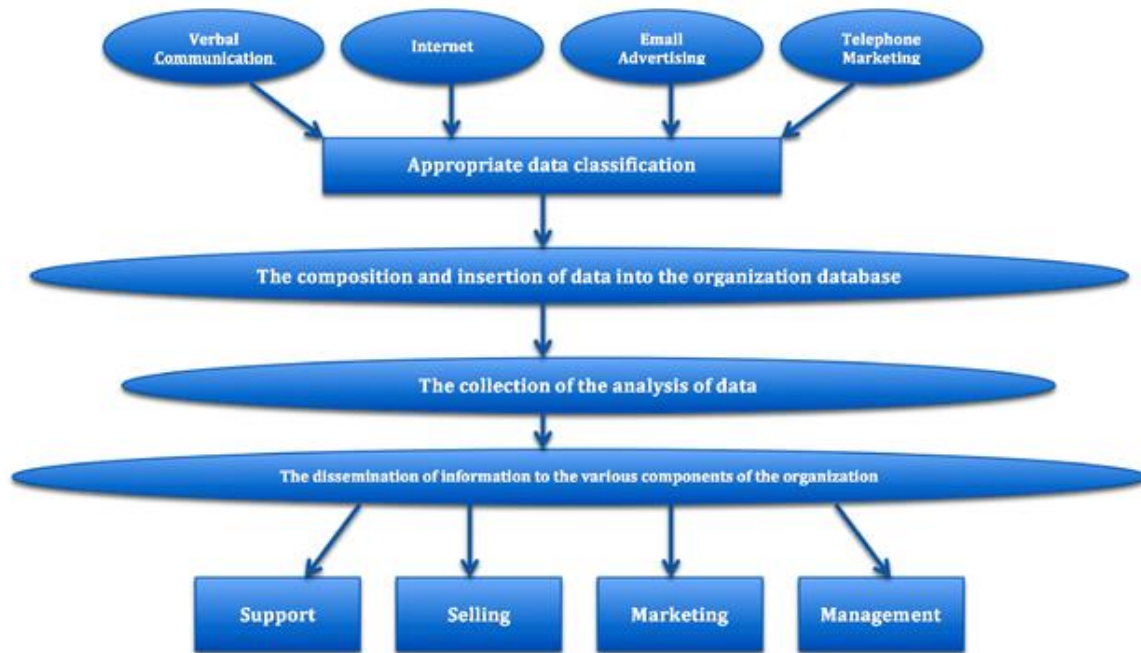
ATTACHMENTS BELOW

- [Project Steering Committee.docx](#)

PROJECT STEERING COMMITTEE	
Project Sponsor: Tina Hughes, Sales and Marketing Manager	
Name	Department
Alex Lee	Marketing (Project Manager)
Con Kafalos	IT
Zane O'Brien	HR
Jay Gartner	Governance
Trish Gibbons	Finance
Abby Smith	Training

- [Overview of CRM Systems.docx](#)

OVERVIEW OF CRM SYSTEMS
<p>Customer relationship management (CRM) is one of many different approaches that allow a company to manage and analyse its own interactions with its past, current and potential customers. It uses data analysis about customers' history with a company to improve business relationships with customers, specifically focusing on customer retention and ultimately driving sales development.</p> <p>One important aspect of the CRM approach is the CRM systems compiling data from various communication channels, including a company's website, telephone, e-mail, live chat, marketing materials and, more recently, social media. Through the CRM approach and the systems used to facilitate it, businesses learn more about their target audiences and how to best cater to their needs.</p> <p>See: https://en.wikipedia.org/wiki/Customer_relationship_management</p> <p>Components of CRM</p>



By Bgrigorov – Own work, CC BY-SA 4.0,
<https://commons.wikimedia.org/w/index.php?curid=49005003>



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 (for the student) Part A: Plan and develop a project communication plan

Steps

1. Review the CBSA organisational chart and the e-mail information provided by Tina Hughes.
2. Complete the **Communications Management Planning** Template consisting of the five Ws and one H to plan for your communication. Approximate word count: 130 words to 160 words

COMMUNICATIONS MANAGEMENT PLANNING	
What	<p>What needs to be done?</p> <p>What do people need to know?</p>
Who	<p>Who do we need to communicate with?</p>
When	<p>When are the project milestones due?</p> <p>When do you need to communicate project deliverables?</p>
Where	<p>Where will the information be provided?</p>
Why	<p>Why is the information needed?</p>
How	<p>How will you communicate the information? Suggest two methods</p>

3. Based on your planning, develop a **Project Communication Management Plan**.

You must use correct vocabulary, spelling and grammar in your report.

PROJECT COMMUNICATION MANAGEMENT PLAN

1. Purpose

Outline the purpose of the Project Communication Management Plan. Word guidance: 12-20 words

2. Communication and information objectives

Describe the communication and information objectives for the project. Word guidance: 15-25 words

3. Communication and information responsibilities

Describe the communication and information responsibilities of the project manager, project team and steering committee. Word guidance: 60-70 words

4. Communication methods and media/tools

Identify two alternative methods and media appropriate for this project and the stakeholders. Word guidance: 2-5 words

5. Communication processes

Explain the project communication and information processes that will be used. Word guidance: 10-20 words

6. Communication and information timing

Describe the project communication and information timing. Word guidance: 20 - 30 words

7. Communication and information metrics

Explain how the effectiveness of the communications and information management for the project will be evaluated. Word guidance: 4 - 10 words

8. Communication and information control and monitoring mechanisms

Explain how communication and information will be validated and controlled. Word guidance: 20-25 words

4. Establish a project management information (PMI) system

Your organisation has decided to implement either MS Project or Monday to manage the CRM project. You have been asked to research, analyse and compare the systems. Complete the below **Project Management Information System Report** to document your findings and recommendations including:

- features and benefits of each system (Word guidance: 90 to 110 words)
- recommendation of the system you have decided on and why (Word guidance: 30 to 50 words)
- where to from here – how you will implement the new system including the process you will use to allocate tasks, assign work and monitor tasks (Word guidance: 70 to 80 words)

To support your findings, you must reference your research (website name, website link and date accessed) in your report.

5. Scenario: You have been given the approval to implement your recommended system. Implement the system by developing an:
- information validation process to check the accuracy of data [Word guidance: 50 words]

6. Scenario: A part of your role, you must monitor and control the quality of the CRM information. The Administration team are responsible for manually entering customer contact details into the CRM when telephone enquiries are made. Each month, you run an error report to check the quality of the data. You have exported the CRM error report to excel. Refer to **BSBPMG535_AssNo5_Appendix 1 – Error Report**.
- Review the report and identify the errors. Provide the correct data in column G 'Error-correction required to data'. This will be sent to the administration team to correct the errors in the CRM.
 - Now that you have identified the cause of the errors, complete the following **CBSA e-mail** template to advise staff of the information management system issues, its cause and what needs to happen to stop errors from occurring. Approximate word count: 50 words

To:	
From:	
Date/time:	
Subject	

Salutation


E-mail body

Student name

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

www.cbsa.com.au



Submission instructions

Submit your assessment via the LMS.

Assessor instructions Part A: Plan and develop a project communication plan

Purpose of task

The purpose is to analyse the communication requirements of the project:

- *Who are the stakeholders in the project?*
- *What information do they require?*
- *What information is required from them?*
- *What are the best channels for communication?*

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.

2. Communications management planning template

Student answers must align with the benchmark provided below.

COMMUNICATIONS MANAGEMENT PLANNING	
What	What needs to be done? Stage 1 – identify two alternatives systems to suit the whole business and replace various ways departments store information about clients What do people need to know? Consulted and informed
Who	Who do we need to communicate with? One member of staff from each department to join the Project Steering Committee Con Kafolos, IT Manager Tina Yates, Project team Tina Hughes, Sales and Marketing Manager Suppliers
When	When are the project milestones due? 4-week timeline When do you need to communicate project deliverables? 4 weeks
Where	Where will the information be provided? Meetings Other alternatives may be provided, such as: intranet, social media platforms, e-mails, surveys, one-on-one meetings, and checklists.

COMMUNICATIONS MANAGEMENT PLANNING	
What	<p>What needs to be done?</p> <p>Stage 1 – identify two alternatives systems to suit the whole business and replace various ways departments store information about clients</p> <p>What do people need to know?</p> <p>Consulted and informed</p>
Why	<p>Why is the information needed?</p> <p>To replace the existing system of various ways departments store client information.</p> <p>The Steering Committee will provide information about user numbers, tracking, reporting features and preferences such as cloud-based on-premises systems.</p> <p>IT Manager will approve the selected system to ensure it meets IT requirements.</p> <p>Suppliers will advise about deployment, system features and cost.</p>
How	<p>How will you communicate the information? Suggest two methods</p> <p>Students must identify one method as:</p> <p>Project Steering Committee</p> <p>Students must identify any other method, such as intranet news, instructions, meetings, documents, fliers, e-mails, and online meetings.</p>

3. Project Communication Management Plan

The student must use correct vocabulary, spelling and grammar.

Student answers must align with the benchmark answer provided in the template below.

PROJECT COMMUNICATION MANAGEMENT PLAN
<p>1. Purpose</p> <p><i>Outline the purpose of the Project Communication Management Plan.</i></p> <p><i>This plan documents the process of communications based on stakeholders' information needs and requirements.</i></p> <p>2. Communication and information objectives</p> <p><i>Describe the communication and information objectives for the project.</i></p> <p><i>To identify two alternative systems to suit the whole business and replace various ways departments store information about clients.</i></p> <p>3. Communication and information responsibilities</p> <p><i>Describe the communication and information responsibilities of the project manager, project team and steering committee.</i></p> <p><i>Steering Committee members have a stake in the project and are those affected by the project. These members must provide input into the features of the system.</i></p>

The project Manager is responsible for managing communication between all stakeholders, including the creation, flow, collection, distribution, storage and retrieval of all information about the project.

The project team will complete the allocated tasks in the WBS and communication plan.

4. Communication methods and media/tools

Identify two alternative methods and media appropriate for this project and the stakeholders.

The student must identify two alternative methods, and this can include Slack, WhatsApp group, and chat boards. There is a diverse range of communication methods and media/tools available. At the diploma level, student answers will vary. The assessor is responsible for verifying the suitability of any other communication method/media not listed.

5. Communication processes

Explain the project communication and information processes that will be used.

The student must explain the communication and information processes that will be used. At the Diploma level, it is expected that communication processes may vary but must be suitable to meet the project objective. Examples may include team meetings, intranet, newsletters, checklists, surveys, and one-on-one meetings.

6. Communication and information timing

Describe the project communication and information timing.

The student must describe the project communication and information timing. Student answers may vary at the Diploma level, but answers must show an understanding of regular intervals. For example, week 1- start-up to determine needs; week 2 – present recommendations and seek feedback; week 3 – make changes and present modifications for approval.

7. Communication and information metrics

Explain how the effectiveness of the communications and information management for the project will be evaluated.

The student must describe how communications and information management effectiveness will be evaluated. It is expected at the Diploma level, answers will vary. For example, stakeholder feedback and analytics.

8. Communication and information control and monitoring mechanisms

Explain how communication and information will be validated and controlled.

The student must explain communication and information control, and monitoring mechanisms. At the Diploma level, it is expected that student answers will vary. For example, key quality metrics, quality criteria checklist, information from the project management plan, work performance data, verified deliverables, validated changes and change requests.

4. Project management information system

At the Diploma level, it is expected that students will use problem-solving skills to analyse and resolve issues. Students words will be similar to the marking guidance provide below. The final recommendation may be different based on their analysis.

PROJECT MANAGEMENT INFORMATION SYSTEM REPORT

The student must research and document to PMI systems, MS Project and Monday that would be suitable for the CRM project.

The report must document:

a. features and benefits of each system

Slight alternatives to the features and benefits may be provided given the student's research. The student's wording may be different but must similar to the following features and benefits:

Monday

- monitoring, managing and tracking workloads
- allows easy communication, collaboration and data visualisation.
- Simple and customisable interface
- Different templates
- Communicate progress on project
- Collaborate and analytical features
- Ease of use

Reference: <https://financesonline.com/top-features-of-monday-com/#:~:text=The%20top%20features%20of%20monday.com%20are%3A%20monitoring%2C%20managing,are%20people%2Dcentric%20by%20design.>

MS Project

- Import, export and easily share projects
- Monitor tasks, costs and team with easy to read graphs
- Collaborate on projects with Mac and PC users
- View tasks in real time, monitor metrics
- Keep on track with project dashboards
- Easy to read colourful graphs
- Spot issues before they become problems

Reference: <https://www.projectmanager.com/software>

b. recommendation of the system you have decided on and why

Recommendation of system may vary depending on the student's research and preference about the features that they believe are most important. The recommendation must be sound based on features, costs, accessibility, ease of use.

For example, Monday is a cost-effective solution that is easy to use and has all of the features required to manage projects. MS Project has features such as graphs that would not be used.

c. Where to from here – how you will implement the new system including the process you will use to allocate tasks, assigning work and monitor tasks.

The student must demonstrate how they will manage information by including the process to allocate tasks, assign work and monitor tasks.

The student's wording may vary but should align with the following:

The Project Manager will create a project board, allocate individual tasks, the project member is notified of the assigned task and due date. The project manager will monitor the status of tasks completion. When tasks are completed, the Project Officers should change the status of the tasks completed which will send a notification to the Project Manager. The Project Manager will review the status of tasks on a weekly basis.

5. Information validation process.

The student must list or explain the validation process. At the Diploma level, the validation process may differ and depend on the project management information system. Any of the following responses or similar are acceptable:

- Data type checks – checking the accuracy of data due to system error reports
- Code checks – using valid entry codes

- Data validation reports in excel
- Audits

6.

a. The student must correct the post code errors. Refer to BSBPMG535_ASSESSOR_AssNo5_Appendix1-Error Report. An extract of the error corrections is provided below:

Error - correction required to data

- 5031
- 5032
- 5165
- 5037
- 5000
- 5000
- 5045
- 5043

b. Complete the following CBSA e-mail template to advise staff of information management system issues, its cause and what needs to happen to stop errors from occurring.

To:	Staff
From:	Student name
Date/time:	Date/time
Subject	Relevant subject such as Error Report

Salutation (Dear/Hello staff)

E-mail body

The body must include:

- Issue (issue must be postcode errors)
- Cause (cause must be data entry error)
- What needs to happen to stop errors from occurring (must be checking data. At the Dipoloma level, students may also provide additional suggestions such as repeating information back to the client or spot checks/audits).

For example:

There have been errors identified in the CRM system. This has been caused by data entry errors for postcodes. To prevent this from occurring can you please double check postcodes. I recommend that you repeat the address and post codes back to the client to ensure the information in the CRM is accurate.

Student name

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

www.cbsa.com.au



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

Marking criteria Part A: Plan and develop a project communication plan

Assessment submission checklist

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

Part A: Plan and develop a project communication plan		
1.	Communications Management Planning	<input type="checkbox"/>
2.	Project Communication Management Plan	<input type="checkbox"/>
3.	Screenshot of folder and documents saved in PMI/Research	<input type="checkbox"/>
4.	Project Management Information System Report	<input type="checkbox"/>

Assessment marking criteria

Assessor instructions: All sections 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 not yet satisfactory (NYS) and requires resubmission.

MARKING CRITERIA		Satisfactory (S)	Not Yet Satisfactory (NYS)
Step 2.	The student submitted the Communication Management Planning template and completed all fields. The student identified and analysed the requirements of the project. Assessor to check student's responses match the Guidance to Assessor benchmark template.	<input type="checkbox"/> S	<input type="checkbox"/> NYS
Step 3.	The student submitted Project Communication Management Plan and completed all fields. Assessor to check student's responses match the Guidance to Assessor benchmark template.	<input type="checkbox"/> S	<input type="checkbox"/> NYS
	The Project Communication Management Plan included correct vocabulary, spelling and grammar.	<input type="checkbox"/> S	<input type="checkbox"/> NYS
Step 4a.	The student archived records according to agreed ownership and control requirements. PMI/Research	<input type="checkbox"/> S	<input type="checkbox"/> NYS
4b.	The student submitted Project Management Information System Report to establish a designated project-management information system. The report included: <ul style="list-style-type: none">two PMIs that would be suitable for the CRM projectfeatures and benefits of each systemrecommendation of the system you have decided on and why	<input type="checkbox"/> S	<input type="checkbox"/> NYS

	<ul style="list-style-type: none"> how the recommended system would be implemented <p>Assessor to check student's responses match the Guidance to Assessor benchmark template.</p>		
5.	<p>The student developed an information validation process to implement the system.</p> <p>Assessor to check student's responses match the Guidance to Assessor benchmark.</p>	<input type="checkbox"/> S	<input type="checkbox"/> NYS
6a.	<p>The student correctly identified the CRM issues and modified, monitored and controlled CRM information validation processes.</p> <p>Assessor to check student's responses match the Guidance to Assessor benchmark.</p>		
b.	<p>The student sent an e-mail to communicate issues to network to resolve communication and information management system issues.</p> <p>Assessor to check student's e-mail matches the Guidance to Assessor benchmark.</p>		

Task instructions (for the student) Part B: Implement project information and communication processes and develop an evaluation report

Case study: Tina Hughes accepted your recommendation for the Customer Relationship Management Project and stage 1 of the project is complete.

The Steering Committee met to evaluate the project outcomes. You have been asked to develop an evaluation report on the communications and information management system to close Stage 1 of the CRM project.

Retrieve the final minutes steering committee by opening the attachment BSBPMG535_AssNo5_Part B-Appendix_Steering Committee.

Steps

1. Based on the final Steering Committee minutes, develop a **Project Communication Evaluation Report**.

You must use correct vocabulary, spelling and grammar in your report.

PROJECT COMMUNICATION EVALUATION REPORT	
Project Name:	
Date:	
Implementation of the Communications Plan <i>Outline how the plan was implemented and the communication processes used. Word guidance: 10-20 words</i>	
Communication Outputs <i>What outcomes were achieved as a result of the communication with stakeholders? Word guidance: 7-15 words</i>	
Effectiveness of the Project Team's Communication and Information Management <i>Refer to the metrics from the Communications Plan to evaluate the effectiveness of communications. Word guidance: 15-25 words</i>	
Issues <i>Discuss communication and information issues that arose. Explain how these were resolved or why they have not been able to be resolved. Word guidance: 20-30 words</i>	
Recommended Improvements <i>Explain what improvements in communications and information management you suggest for the next stage of the project. Word guidance: 25-50 words</i>	

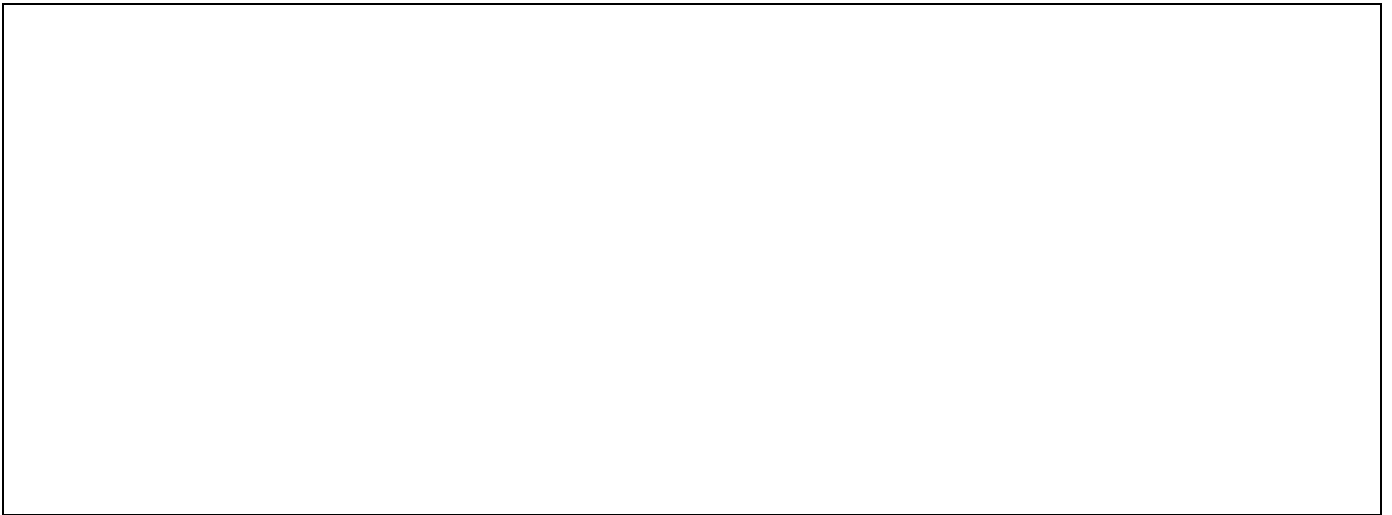
Report developer:	
Signature:	
Date:	

2. To close the project, you are required to archive the records.

Save the project information and communication documents (task 5 assessment documents) as:

- Save BSBPMG535_AssNo5_Part B- Appendix_Steering Committee as **SC_Minutes.dd.mm.yy** (with today's date, month, year)
- Save this assessment task document, task 5, as **Evaluation Report.dd.mm.yy** (with today's date, month, year)

Save the documents in a folder on your computer called Archive. Provide a screenshot below of your archive folder with the two documents saved.



Submission instructions

Submit your assessment via the LMS.

Assessor instructions Part B: Develop an evaluation report

Purpose of task

This part is designed to ensure that the student can prepare for a presentation based on organisational policies and procedures and the objective of the presentation.

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.

PROJECT MANAGEMENT EVALUATION REPORT	
Project Name:	Stage 1 of a Customer Relations Management System Project
Date:	Dd month yy
Implementation of the Communications Plan <i>Outline how the plan was implemented and the communication processes used. Word guidance:</i> <i>Communication plan was developed. Two systems were recommended before a system was implemented.</i>	
Communication Outputs <i>What outcomes were achieved as a result of the communication with stakeholders?</i> <i>PMI system suitable for the CRM project.</i>	
Effectiveness of the Project Team's Communication and Information Management <i>Refer to the metrics from the Communications Plan to evaluate the effectiveness of communications.</i> <i>The student must evaluate the effectiveness of the plan by measuring the outcomes against the plan</i>	
Issues <i>Discuss communication and information issues that arose. Explain how these were resolved or why they have not been able to be resolved.</i> <i>Issues arose, including the unavailability of some key stakeholders and erroneous communication with the CRM supplier and explained how these were resolved.</i>	
Recommended Improvements <i>Explain what improvements in communications and information management you suggest for the next stage of the project.</i> <i>The student must make recommendations. Recommendations must include system improvements, training on the PMI system, and timing adjustments that could be implemented for the next stage of the project.</i>	
Report developer:	

Signature:	
Date:	

2. The student must provide a screenshot of the saved documents in a folder called **Archive** with the documents as:

- **SC_Minutes.dd.mm.yy** (with today's date, month, year)
- **Evaluation Report.dd.mm.yy** (with today's date, month, year)

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

Marking criteria Part B: Develop an evaluation report

Assessment submission checklist

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

Part B: Develop an evaluation report		
1.	Project management evaluation report	<input type="checkbox"/>
2.	Screenshot of saved documents	

Assessment marking criteria

Assessor instructions: All sections 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 not yet satisfactory (NYS) and requires resubmission.

MARKING CRITERIA		Satisfactory (S)	Not Yet Satisfactory (NYS)
1.	The student submitted the Project Communication Evaluation template and completed all fields. Assessor to check student's responses match the Guidance to Assessor benchmark template.	<input type="checkbox"/> S	<input type="checkbox"/> NYS
	The Project Communication Management Plan included correct vocabulary, spelling and grammar.	<input type="checkbox"/> S	<input type="checkbox"/> NYS
2.	The student submitted a screenshot of the archived folder with documents saved in the folder according to the agreed control requirements.	<input type="checkbox"/> S	<input type="checkbox"/> NYS

Congratulations, you have reached the end of Assessment 5

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