



BSBOPS306

ASSESSOR GUIDE

Record stakeholder interactions

Assessment 1 of 2

Short Answer Questions

Assessment Instructions

Task overview

This assessment task is divided into ten (10) short answer questions. Read each question carefully before typing your response in the space provided.

Additional resources and supporting documents

To complete this assessment, you will need:

- World Traveller Recording Stakeholder Interaction Policy and Procedure
- World Traveller Privacy and Confidentiality Policy

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

World Traveller is a travel management company primarily specialising in inbound and outbound tours. They are a small business, and they pride themselves on their ability to service a wide range of clients, leisure travellers, business, government delegates and student educational tours between Australia and Asia.

World Traveller is based in Melbourne. Tyler has recently been hired as a customer service representative. Tyler is currently in the final phase of the induction process and is ready to be signed off by management for completion. As part of the final stages of the induction process, Tyler has been asked by management to complete the short answer questions to demonstrate knowledge of the requirements of the role.

Question 1

Explain three (3) common note-taking methods.

(Approximate word count: 250 words)

Assessor Instructions

The student's response must include the following information:

- The following note-taking methods:
 - The outline method
 - The concept map method
 - The Cornell method

A sample answer is provided below.

Method 1: [name]
<p>The outline method</p> <p>The advantage of the outline method is that it allows you to prioritise the material.</p> <p>Key ideas are written to the left of the page, subordinate ideas are then indented, and details of the subordinate ideas can be indented further. To further organise your ideas, you can use the typical outlining numbering scheme.</p>
Method 2: [name]
<p>The concept map method</p> <p>This is a very graphic method of note-taking that is especially good at capturing the relationships among ideas. Concept maps harness your visual sense to understand complex material "at a glance."</p> <p>To develop a concept map, start by using your documents to rank the ideas you will listen to by level of detail (from high-level or abstract ideas to detailed facts). Select an overriding idea and place it in a circle in the middle of the page.</p>
Method 3: [name]

The Cornell method

The Cornell method follows a very specific format that consists of four boxes: a header, two columns, and a footer. The header is a small box across the top of the page.

Underneath the header are two columns: a narrow one on the left (no more than one-third of the page) and a wide one on the right. The wide column called the “notes” column, takes up most of the page and is used to capture your notes using any of the methods outlined earlier. The left column, known as the “cue” or “recall” column, is used to jot down main ideas, keywords, questions, clarifications, and other notes.

Question 2

List the document that identifies the privacy and confidentiality guidelines mandated for World Traveller team members and briefly describe five (5) privacy and confidentiality protocols World Traveller team members must abide by when recording stakeholder interactions.

(Approximate word count: 150 words).

Assessor Instructions

Students must identify the World Traveller Privacy & Confidentiality Policy and briefly describe five (5) privacy and confidentiality protocols from the policy. The student's response must reflect the sample answer below.

Name of document:	World Traveller Privacy and Confidentiality Policy
Privacy and Confidentiality Protocols	
1.	World Traveller is committed to providing quality services to you and this policy outlines our ongoing obligations to you in respect of how we manage your Personal Information. We have adopted the Australian Privacy Principles (APPs) contained in the Privacy Act 1988 (Cth) (the Privacy Act).
2.	Your Personal Information is stored in a manner that reasonably protects it from misuse and loss and from unauthorised access, modification or disclosure.
3.	You may access the Personal Information we hold about you and update and/or correct it, subject to certain exceptions. If you wish to access your Personal Information, please contact us in writing.
4.	In order to protect your Personal Information, we may require identification from you before releasing the requested information.
5.	When your Personal Information is no longer needed for the purpose for which it was obtained, we will take reasonable steps to destroy or permanently de-identify your Personal Information. However, most of the Personal Information is or will be stored in client files which will be kept by us for a minimum of 7 years.

Question 3

Review World Traveller Recording Stakeholder Interaction Policy and Procedure. Describe the steps for recording details of stakeholder interaction in a Customer Management System (CMS).

(Approximate word count: 200 words)

Assessor Instructions

The student must list the procedure for recording details of stakeholder interactions in a CMS as outlined in the World Traveller Recording Stakeholder Interaction Policy and Procedure.

The student's response must match the sample answer below.

Step	Description
Step 1: Prepare to record stakeholder interactions	a) Collect information from stakeholder interactions: This may include in person or via feedback forms, email, SMS, social media or telephone messages
	b) Review purpose of stakeholder interaction: Is this a complaint? Request for information etc.?
	c) Review information collected from stakeholder interaction: Double-check the details, including spelling of names, date of birth and contact telephone or email addresses.
	d) Identify any other organisational policies and procedures and determine the information to be included in the record: For example, a refund policy and procedure or cancellation conditions
Step 2: Create a record of stakeholder interaction	a) Enter details of stakeholder interaction in required CMS fields according to organisational policies, procedures and protocols.
	b) Check that collected information has been attributed to appropriate stakeholders in CMS
Step 3: Finalise and review the recording process	a) Confirm records represent stakeholder views, are free of bias and opinion, and comply with organisational requirements.
	b) Check completeness and discoverability of records: Check all details and ensure that records are saved.
	c) Complete required processes for finalising and saving created records in CMS according to organisational policies and procedures

Question 4

Describe any five (5) basic business writing principles.

(Approximate word count: 200 words)

Assessor Instructions

The student's response must include any five (5) of the basic business writing principles listed below.

Name of principle		Description
1.	Clarity of purpose	Before beginning a business document, memo, or email, one should ponder two primary questions: <ul style="list-style-type: none"> • Who is the reader? • What do I want to convey to the reader through my writing? Clarity of purpose gives a direction to the writing and develops its tone, structure, and flow.
2.	Clarity of thought	Thinking while, rather than before, writing makes the writing less structured, meandering, and repetitive. Business writing requires the skill to reduce long, rambling sentences into concise, clear ones.
3.	Convey accurate and relevant information	The primary goal of business writing is to convey valuable information. Inaccurate or irrelevant content affects the purpose of the document.
4.	Avoid jargon	A simple and uncluttered writing style goes a long way in communicating the message to the reader.
5.	Be direct	Presenting the crux of the passage in the first 150 words is a good idea when it comes to business writing. It saves the reader time and sharpens the argument.
6.	Avoid verbosity	If the meaning can be conveyed in three words, it should not be stretched to five. Verbosity works against making the writing engaging to the reader.
7.	Correct grammar and sentence structure	While a grammatical error may come across as unprofessional, good grammar portrays both attention to detail and skill traits highly valued in the business.

Question 5

List any five (5) principles of plain English.

(Approximate word count: 60 words)

Assessor Instructions

The student must list five (5) principles of plain English. Exemplar responses are provided below. Responses from [Plain language and word choice | Style Manual](#) are also correct.

Principles of Plain English	
1.	Write in active voice. Use the passive voice only in rare cases.
2.	Use short sentences as much as possible.

3.	Use everyday words. If you must use technical terms, explain them in the first reference.
4.	Use pronouns when you can.
5.	Omit unneeded words.

Question 6

List six (6) common purposes for stakeholder interactions.

(Approximate word count: 20 words)

Assessor Instructions

The student must list six (6) common purposes for stakeholder interactions. Exemplar responses are provided below.

Common stakeholder interactions			
1.	Making a complaint	4.	Making a booking
2.	Requesting information	5.	Providing feedback
3.	Placing an order	6.	Requesting a refund

Question 7

Describe, in your own words, what is meant by the 'context' of a stakeholder interaction.

(Approximate word count: 40 words)

Assessor Instructions

The student's response must reflect the exemplary response provided below.

Meaning of Context
<p>The context of a stakeholder interaction refers to the background behind the interaction. In other words, why is the interaction occurring? When we talk about context, we are referring to:</p> <ul style="list-style-type: none"> • Background • Circumstances • Environment • Setting • Situation

Question 8

What are the positive outcomes of stakeholder interaction activities in the workplace? List five (5).

(Approximate word count: 30 words)

Assessor Instructions

The student's response must reflect five (5) of the exemplary responses provided below.

Positive outcomes of stakeholder interaction activities in the workplace

Positive outcomes of stakeholder interaction include:

- Creates higher-quality decision making
- Avoids duplication
- Increases efficiency and effectiveness of service delivery
- Supports sustainability planning
- Creates higher quality decision making
- Avoids duplication
- Increases efficiency and effectiveness of service delivery
- Supports sustainability planning

Question 9

According to the World Traveller Recording Stakeholder Interaction Policy and Procedure, what information is relevant when recording the purpose of a stakeholder interaction?

(Approximate word count: 60 words)

Assessor Instructions

The student's response must reflect the exemplary response provided below.

What information is relevant when recording the purpose of a stakeholder interaction

Information that is recorded must be objective and factual. You must consider what information is required to satisfactorily address the customer's needs.

Information that is relevant to stakeholder interaction purposes includes:

- Name/s (of stakeholders)
- Date/s
- Purpose of the interaction
- Details of interaction

Depending on the purpose of the interaction, you may also include:

- Desired outcomes
- Timelines (dates)
- Responsibilities (who will do what, when and how)
- Costs (if appropriate)
- Approvals (if required)
- Follow-up and monitoring of the interaction
- Closure and outcomes of the interaction
- Sign-off

Question 10

List and describe three (3) key features and functions of a Customer Management System (CMS).

At least one of these must relate to record saving.

(Approximate word count: 150 words)

Assessor Instructions

The student's response must include three (3) of the Features listed below:

Features (3)	Function
Contact management (record saving)	Stores contact information such as names, addresses, and social media accounts in a searchable database
Interaction tracking	Add notes and track interaction history to document conversations with specific contacts
Lead management	Manage the process of converting prospects into potential customers (leads) by identifying, scoring, and moving leads through the sales pipeline
Email integration (record saving)	Integrate with email such as Gmail, Outlook, Yahoo, etc., allowing for management and segmentation of contact lists, as well as a centralised hub for internal cross-collaboration
Document management (record saving)	Collect, upload, store, and share documents in a centralised location, making it easier for everyone involved to access information
Acquiring and storing information (record saving)	It is one of the most important functions performed by CMS. It collects and stores information about target customers from the market. The information collected is stored in databases centrally

Features (3)	Function
1.	
2.	
3.	

Assessment checklist

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

1	Ten (10) short answer questions to be completed in the spaces provided.	
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Congratulations! You have reached the end of Assessment 1.

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