

BSBPMG420

Apply project scope management techniques

Assessment 2 of 3

Project 1 with Role Play

Assessor Guide



Assessment Instructions

Task overview

This assessment consists of six [6] tasks related to a simulated project.

Read the scenarios and related task instructions carefully before completing each task.

Additional resources and supporting documents

To complete this assessment, you will need to access the following documents:

- Business case for office consolidation (available on LMS)
- Financial analysis report (available on LMS)
- Scope Management Plan template (available on LMS)
- Project Change Request Form (available on LMS)
- Project Audit Checklist (available on LMS)

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.

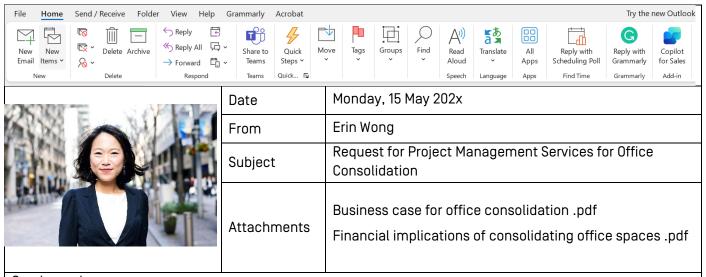




SCENARIO

You are employed as a Project Officer at CBSA.

Read the following email from a potential new client of CBSA, then complete the tasks that follow.



Good morning,

I hope this email finds you well.

I am reaching out on behalf of Demian Investment Group to explore the possibility of partnering with your esteemed firm for an upcoming project. We are considering consolidating our office spaces to better align with our evolving business needs and would like your expertise to coordinate and manage this process.

As our company continues to grow and adapt to the changing business landscape, we have observed several key factors driving this need:

- Increased online clientele: With a significant rise in online and remote client interactions, the demand for extensive physical office space has diminished. Our current office setup no longer aligns with our operational requirements, prompting a re-evaluation of our space needs.
- Cost efficiency: The rising cost of office space has become a substantial factor in our financial planning. By consolidating our offices, we aim to optimise our expenditures and invest more strategically in areas that directly contribute to our growth and client services.

Given these considerations, we are seeking a project management company with a proven track record in overseeing office consolidation projects.

We believe that your expertise and experience in managing similar projects would be invaluable to ensuring a smooth and efficient transition. We would appreciate the opportunity to discuss this project further and explore how we might work together to achieve our goals.

Please find attached the approved business case and the financial report supporting the business case to better understand the estimated financial implications of consolidating office spaces. Hope this will help outline the project.

Please let us know your availability for an initial discussion. We look forward to your response and the possibility of collaborating with your team.



Thank you for your time and consideration.

Best regards,

Erin Wong

Managing Director



Demian Investment Group 150 Oxley Drive, Sydney, NSW 2000 Phone: 1800 011 022 www.demianinvestment.com.au

TASK 1 - ROLE PLAY

Read the scenario and the client's email carefully, including the information in the attachment.

You are required to conduct a role play as a project kick-off meeting with Erin Wong, the Demian Investment Group's Managing Director, to clarify project requirements.

The meeting must include at least **one** (1) participant, apart from the student, must not exceed 10 minutes duration and must address all requirements listed under Key Observation Criteria.

Key Observation Criteria

During the role play, you will be required to:

- open the meeting and explain the purpose of the meeting
- identify project objectives and requirements and clarify the accuracy of the information with participant. You must identify minimum **two (2)** objectives.
- propose project deliverables and seek clarification from Participant
- propose at least one (1) measurable outcome for each deliverable and seek confirmation from participant
- interact effectively and use clear language to convey information
- use active listening and questioning to clarify understanding.

Participant information

During the role play, you will demonstrate your skills in interacting with one other person. Participants in your role play may be:

- 1. friends or family members; or
- 2. fellow student/s who will play the role of a team member.

Option 1: Friend or family member

Should you complete this task with friends or family members, you must fully brief each participant, providing them with the context of the role play, a role outline to play and the 'Key Observation Criteria' so that they can prepare for the recording.



Each friend or family member participant will need to state their name and the role they are playing at the start of the recording to provide their consent.

Option 2: Fellow student participant

Please contact your fellow student/s via the Discussion Forum and coordinate your role play with them directly.

Fellow student participating in the recording must be provided with context to their role and responsibilities in the session and have reviewed the assessment activity with the 'Key Observation Criteria' so that they can prepare for the recording.

Student will need to state their name and the role they are playing at the meeting at the start of the recording to provide consent.

Participants' briefing instructions

Participant (playing the role of Erin Wong)

Before commencing the role play, the Participant should read the scenario provided with the supporting documents for context.

When asked about project's objectives and requirements, Erin should state the following:

"We are hoping CBSA can assist with the following:

- Assessment of current office space and identification of consolidation opportunities. We want to keep an
 office in Sydney and Brisbane.
- We need CBSA to coordinate the move process, including logistics and vendor management. This includes identifying potential office locations, evaluating and selecting office spaces, finalising leasing agreements, complete renovations (if required) and execute the move with setting up new office spaces.
- We need CBSA to develop a detailed project scope management plan with timelines. CBSA should commence the project 1 June and have 7 months for full completion of phases 1-4.
- We need CBSA to manage effective communication with all stakeholders throughout the consolidation process."

Participant is encouraged to ask questions whenever further clarification is required. Whenever the student asks a question from Participant for clarification, Participant should respond in line with the scenario. If the answer is not provided in the scenario (e.g. timeline), Participant should improvise a response in accordance with the scenario.

Recording instructions

Your role play must be recorded with all participants captured in a virtual room using an application such as Zoom, Skype or Teams. Cameras must be turned on during the meeting.

Consent to participate in the recording must be captured for all participants at the start of the meeting. This is achieved by the student reading the following statement at the start of the recording, followed by all participants replying with their names and the roles they are playing to provide their consent.

"This session 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 participants in this session indicate their consent to be included in this recording by stating their name and the role they are going to play."

The time taken to capture consent at the start of the recording does not count towards the recording time limit.

Save the video recording in MP4 format, using the following naming convention, *BSBPMG420_Project 1 Role Play_Student Name*. Include this recording as part of your assessment submission.

Assessor instructions

Student is required to conduct a 10-minute role play as a project kick-off meeting with Erin Wong, the Demian Investment Group's Managing Director, to clarify project requirements.

Use the following Observation Checklist to record your observations while you watch the video. Where all criteria are demonstrated, write a general comment in the Student Assessment Feedback Form. Where one or more criteria are not demonstrated to a satisfactory standard, make a specific comment for each criterion requiring re-submission, including constructive feedback in the Student Assessment Feedback Form.

Observation Che (to be completed by th	
Use this checklist while reviewing the recorded role pl	lay:
Did the student	Satisfactory/Not Yet Satisfactory
Open the meeting and explain the purpose of the meeting	
Student must open the meeting by welcoming the participant and explaining the purpose of the meeting, such as "Good morning Erin, thank you for making time to attend this meeting to clarify project requirements."	□Satisfactory □Not Yet Satisfactory
Identify project objectives and requirements and clarify the accuracy of the information with participant. Student must identify minimum 2 objectives.	□Satisfactory
Student must identify minimum 2 project objectives, such as cost reduction, operational efficiency, free up financial resources to invest in strategic growth areas and client service enhancements.	□Not Yet Satisfactory
Student must check the accuracy of the information [e.g. the company wants to consolidate 5 offices into 2 to reduce cost.	
Propose two (2) project deliverables and seek clarification from Participant	
Student must propose 2 realistic project deliverables, such as:	□Satisfactory □Not Yet Satisfactory



reallocated to strategic growth areas and	
client service enhancements.complete a post-move evaluation report by a	
certain due date	
 create a Client Service Improvement Report by 	
a set due date evaluating the enhancements	
made to client service as a result of the office	
consolidation.	
Student must check with Participant whether she	
agrees with objectives.	
Propose at least one (1) measurable outcome for	
each deliverable and seek confirmation from	
participant	
Student must propose a realistic deliverable for each	
objective, for example:	
Draft project plan: have a clear project scope and allow timelines and milestance set by a set.	
and clear timelines and milestones set by a set date.	
Post-evaluation report: The report must include	□Satisfactory
a comparison of actual results against pre-	□Not Yet Satisfactory
defines objectives.	
 Increased client satisfaction: Demonstration of at least a 10% increase in client satisfaction 	
scores or service quality metrics, as measured	
through client surveys or feedback	
mechanisms, within six months of	
implementing service enhancements.	
Student must check with Participant whether she	
agrees with deliverables.	
Interact effectively and use clear language to	
convey information	□Satisfactory
Student must be able to present information clearly,	□Not Yet Satisfactory
using professional English	
Use active listening and questioning to clarify	
understanding.	
Student must be able to ask questions to clarify	Cotiofo atom.
understanding, such as "Excuse me, could you repeat	□Satisfactory
your last sentence?" or paraphrasing what the	□Not Yet Satisfactory
Participant was saying to ensure clear understanding.	
Student also must be able to listen to Participant without interruption.	
Assessor Name:	
Date:	

TASK 2

Based on the scenario provided in Task 1's email scenario and the information discussed during the role play, draft a scope management plan using the template provided.

The draft Scope Management Plan must include:

• the project's scope statement, detailing what the project will deliver



- two (2) SMART objectives of what the project aims to achieve
- two (2) deliverables in accordance with the objectives
- work breakdown structure (WBS) of project deliverables and tasks with a proposed timeline
- scope validation process with methods for ensuring deliverables meet the scope requirements and are accepted by stakeholders
- a scope control procedure, including how changes will be requested, evaluated, and approved.

Using the template provided, write an email to Erin and CBSA's Project Manager, Jess Yun, to send though the Scope Management Plan for approval. Don't forget to attach the document to the email by writing the document's name in the 'Attachment' section.

Save the completed Draft Scope Management Plan with the following naming convention: BSBPMG420_02_Project 1_Draft Scope Management Plan_Student Name.

Assessor Instructions

Student must address each section of the template with realistic information. Objectives must be SMART and relevant to the project with relevant deliverables. The information discussed during the role play should be reflected in the plan. WBS of project deliverables and tasks should follow the phases outlined in the Business case (i.e. Phase 1: Project Planning and Approval (Month 1); Phase 2: Lease Evaluation and Negotiations (Month 2-3); Phase 3: Consolidation Execution (Month 4-6); Phase 4: Post-Consolidation Review and Adjustments (Month 7).

The level of details and the number of tasks in the WBS may vary; however, it must be relevant to each phase. Timelines must be realistic and follow the proposed timeline of the business case (i.e. identified month), however, it can use week numbers (such as week 1) or actual dates (1 June 202x).

The length of the project must not exceed 7 months as it is prompted by the timeline captured in the Business Case.

See sample answers in the BSBPMG420_02_Project 1_Scope Management Plan Template_ASSESSOR GUIDE document.

A sample email is provided below.

From	< <your name="">></your>
То	Jess Yun, Erin Wong
Subject	< <type subject="" your="">></type>
	For example: Draft Scope Management Plan attached
Attachments	< <write attachment="" name="" s="" the="">> Student must write here: "Scope Management Plan" or similar</write>



<<wri><< write your 50-100 words email here >>

For example:

Good morning,

Thank you for taking the time to meet with me yesterday, Erin. Based on the project initiation documentation provided and in accordance with our discussion, I have drafted the Scope Management Plan, as requested.

Please find this document attached, ready for your review and approval.

If anything needs to be modified, please don't hesitate to contact me.

Kind regards, Student/s name

TASK 3

Erin and Jess, CBSA's Project Manager were pleased with your work and approved your Scope Management Plan. It is time to research potential office spaces.

Access the website Commercial Real Estate at https://www.commercialrealestate.com.au/ and search for available offices with around 100 square meter floor size both in Sydney and Brisbane. You may research offices in the CBD area or at any suburb of your choice. Erin's only preference was to find an office that is close to public transport.

Complete the following table with your findings:

- 3 available offices for each city, including the suburb, size and 2 key features.
- specify the cost of lease if included in the ad.
- Include the hyperlink to the ad.

Once you completed the table, write an email in the template provided to Erin and CBSA's Project Manager with a summary of your findings and ask for further instructions.

Assessor instructions:

Students must complete the following table with their findings of 3 available office spaces for each city. Examples of the findings are captured in the sample email provided.

City	Suburb	Office size	2 key features	Cost of lease (if available)	Hyperlink to ad
Sydney					
Brisbane					

From	< <your name="">></your>
То	Jess Yun, Erin Wong
Subject	< <type subject="" your="">></type>
	For example: Available offices



Attachments

<<Write the attachment/s name>>

N/A

<<wri>eyour 300-500 words email here >>

For example: Good morning,

I hope this email finds you well. As requested, I have conducted a search for available office spaces in Sydney and Brisbane, focusing on offices around 100 square meters. Below is a summary of three suitable options in each city, including key features and lease details.

Sydney Office 1:

Suburb: Surry Hills Size: 95 square meters

Key Features: Modern fit-out, natural light Lease Cost: \$800 per square meter per annum

Additional Info: The office is located close to public transport and includes a kitchenette.

Office 2:

Suburb: North Sydney Size: 105 square meters

Key Features: Open-plan layout, harbor views Lease Cost: \$850 per square meter per annum

Additional Info: The office is within a secure building and has access to shared meeting rooms.

Office 3:

Suburb: Pyrmont Size: 100 square meters

Key Features: High ceilings, close to amenities Lease Cost: \$900 per square meter per annum

Additional Info: Includes parking spaces and is a short walk from cafes and shops.

Brisbane Office 1:

Suburb: Fortitude Valley Size: 98 square meters

Key Features: Exposed brick, creative hub Lease Cost: \$700 per square meter per annum

Additional Info: The office is located in a vibrant area with easy access to public transport.

Office 2:

Suburb: South Brisbane Size: 100 square meters

Key Features: River views, modern design Lease Cost: \$750 per square meter per annum

Additional Info: Includes secure entry and proximity to cultural precincts.

Office 3:

Suburb: Milton

Size: 102 square meters

Key Features: Balcony access, flexible layout Lease Cost: \$720 per square meter per annum

Additional Info: The office offers on-site parking and is close to major highways.

Please review the above options and let me know if any of these meet your requirements. If you need more information on any of the offices, or if you would like me to narrow down the options further, please do not hesitate to reach out.



Looking forward to your instructions.	
Kind regards,	
Student/s name	

TASK 4

Erin and her team reviewed your research regarding available office spaces and shortly after, they have sent CBSA a Project Scope Change Request Form, requesting changes in the project. Review the form, then update the Scope Management Plan completed in Task 2 accordingly.

Save the updated document with the following naming convention: *BSBPMG420_02_Project 1_Updated Scope Management Plan_Student Name*.

Then, using the template provided, write an email to Erin and Jess Yun, to send though the updated Scope Management Plan for approval. Don't forget to attach the document to the email by writing the document's name in the 'Attachment' section.

Assessor Instructions

Student must update the Scope Management Plan to address the changes in the scope as follows:

- Update the scope statement. For example: "The Office Consolidation Project aims to consolidate five
 existing office spaces into two current office locations in Sydney and Brisbane. The project will focus on
 leveraging these existing spaces to reduce costs and improve operational efficiency, while also
 facilitating a shift to a hybrid work model. This involves encouraging 60% of staff to work from home
 and managing the redistribution of office furniture and equipment."
- Depending on objectives and deliverables, student may need to update these as well to reflect changes (sample answers given don't require updating.)
- Update WBS to reflect changed timelines and scope change. For example:

Phase 1: Project planning and approval (Month 1) – no update required

Updated Phase 2: Office Utilisation and Preparation (Month 2-3), for example:

Assess Existing Offices (Weeks 3-4)

Plan Furniture and Equipment Redistribution (Weeks 5-6)

Finalise Office Adjustments (Weeks 7-8)

Phase 3 may not need updating (Consolidation Execution, Month 4)

Procure contractors and materials for potential renovation work (Week 9)

Complete renovation if required (Weeks 10-12)

Phase 4 may not need updating, apart from updating timeline: Post-Consolidation Review and Adjustments (Month 5)

According to the scope change request, the length of the project must not exceed 5 months.

A sample email is provided below.

From < <your name="">></your>	
----------------------------------	--



То	Jess Yun, Erin Wong
Subject	< <type subject="" your="">> For example: Updated Scope Management Plan attached</type>
Attachments	< <write attachment="" name="" s="" the="">> Student must write here: "Updated Scope Management Plan" or similar</write>

<<wri>te your 50-100 words email here >>

For example:

Good morning,

Thank you for sending through the Project Scope Change Request Form. Based on the form, I have updated the Scope Management Plan, as requested. The change impact the scope statement and WBS with timelines.

Please find this document attached, ready for your review and approval.

If anything needs to be modified, please don't hesitate to contact me.

Kind regards, Student/s name

TASK 5

According to CBSA's procedures, Jo Palmer, Compliance Manager at CBSA conducted an internal audit on the project at the end of Phase 1, completing a Project Audit Checklist to ensure that the project align with overall scope.

Review the Project Audit Checklist, then write an email in the template provided to Jess Yun, CBSA's Project Manager and the project team to communicate the audit findings.

Your email must highlight all non-compliances found with the project's scope and recommend remedial actions.

Assessor Instructions

Student must write an email to highlight all non-compliances found with the project's scope and recommend remedial actions.

A sample email is provided below:

From	< <your name="">></your>
То	Jess Yun, Project team
Subject	< <type subject="" your="">></type>
	For example: Non-compliances with project scope at the end of Phase 1
Attachments	< <write attachment="" name="" s="" the="">> N/A Alternatively, the student may attach the audit report here</write>



<<wri>te your 200-300 words email here >>

For example:

Dear All,

I hope this email finds you well.

Following our recent audit of the project's adherence to its scope, I would like to bring to your attention two significant non-compliances that have been identified:

1. Project Boundaries/Exclusions Documentation:

Issue: The scope management plan currently lacks documentation of the project boundaries and exclusions. Impact: This omission may lead to scope creep and misunderstandings about the project's limits and deliverables.

2. Detailed Project Plan Submission:

Issue: A comprehensive project plan, including detailed timelines, resource allocation, and specific deliverables, has not been submitted vet.

Impact: Without a detailed plan, it is challenging to ensure all team members are aligned and to manage project progress effectively.

Recommended Remedial Actions:

1. Update Scope Management Plan:

Action: Document the project boundaries and exclusions clearly in the scope management plan.

Outcome: This will help prevent scope creep and ensure all stakeholders understand the project's limits and exclusions.

2. Develop and Submit Detailed Project Plan:

Action: Prepare and submit a comprehensive project plan that includes detailed schedules, resource allocations, and deliverables.

Outcome: A detailed plan will facilitate better project tracking, resource management, and alignment among team members.

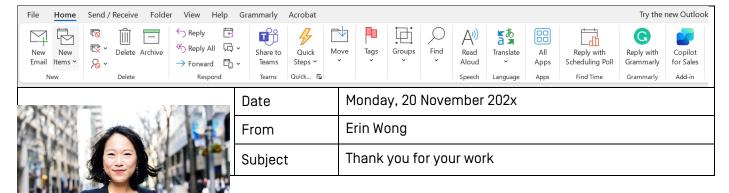
Please prioritise these actions and provide an update on the progress by [specific date, e.g., the end of this week]. Addressing these issues promptly will help ensure the project stays on track and meets its objectives effectively.

Thank you for your attention to these matters. I am available to discuss further if needed.

Kind regards, Student/s name

TASK 6

At the completion of the project CBSA received the following email from Erin Wong:





Attachments

Good morning,

I hope this email finds you well.

I would like to express my gratitude for assisting us to consolidate office spaces. I know we had a few hiccups along the way, but the project was successfully completed and now we operate from one office in Sydney and another office in Brisbane, with 60% of our staff working from home. I really appreciate all your hard work; the majority of staff gave positive feedback on the changes within our company.

I thought I share some data regarding the project to help you review the effectiveness of the project. This may contribute to CBSA's continuous improvement to be market-leading in project management services.

Here are the key findings:

Budget Adherence: The project was completed with a total expenditure of \$250,000 which is 65% below the initial budget. I know this is mainly due to the change in project scope as we decided to utilise our existing offices. I wish we thought of this earlier as it could have shortened the length of the project significantly.

Cost Savings: We achieved a significant reduction in lease, maintenance, and utility costs, resulting in a significant cost saving, which is slightly higher than what we forecasted, so this is a definite win.

We managed to complete the project in 5 months which meets the expectations set in the Scope Change Request form. The detailed project plan that was submitted after the completion of Phase 1 with clear responsibilities also helped achieving the project's success.

Overall, we are grateful for all your help and we will utilise CBSA's services in the future.

Best regards,

Erin Wong

Managing Director

Denian
INVESTMENT GROUP

Demian Investment Group 150 Oxley Drive, Sydney, NSW 2000 Phone: 1800 011 022 www.demianinvestment.com.au

Read the email carefully, then answer the following questions:

Question 1

Explain whether the project was successful in achieving the project's defined outcomes based on Erin's feedback. Support your response with data if possible.

[Approximate word count: 120-160 words]



Assessor instructions: Student responses are likely to include different wording than the sample answer provided. However, the acceptable responses must:

- be within the specified word limit
- reflect the characteristics described in the exemplar answer
- explain whether the project was successful in achieving the project's defined outcomes based on Erin's feedback.

A sample answer is provided below.

Based on Erin's feedback and the provided data, the project was successful in achieving its defined outcomes.

Budget Adherence:

The project was completed with an expenditure of \$250,000, 65% below the initial budget. This cost saving resulted from the scope change to utilize existing offices, which significantly reduced costs and highlighted effective budget management.

Cost Savings:

We achieved substantial reductions in lease, maintenance, and utility costs, surpassing our initial forecasts. This demonstrates the project's success in achieving its financial efficiency goals and delivering higher-than-expected savings.

Project Duration:

The project was completed in 5 months, meeting the revised expectations set in the Scope Change Request form. This reflects efficient project management and adherence to the updated schedule.

Stakeholder Feedback:

Staff feedback was predominantly positive, and 60% of employees are now working from home, aligning with our objectives. The successful consolidation into offices in Sydney and Brisbane further indicates that the project met its operational goals.

Question 2

Considering the information provided and your responses given in Task 6 Question 1, suggest **three (3)** potential improvements that CBSA may implement for future projects.

[Approximate word count: 5-45 words each]

Assessor instructions: Student responses are likely to include different wording than the sample answer provided. However, the acceptable responses must:

- be within the specified word limit
- reflect the characteristics described in the exemplar answer
- suggest three [3] potential improvements that CBSA may implement for future projects.

A sample answer is provided below.

1. Early Scope Definition:

Clearly define and finalise the project scope early on to prevent scope changes that could impact the budget and timeline. This will help in more accurate budgeting and scheduling, reducing the need for last-minute adjustments.

2. Detailed Budget Planning:



Develop a more detailed and flexible budget plan that includes contingencies for potential changes or unforeseen costs. Allows for better financial management and avoids significant deviations from the planned budget.

3. Stakeholder Engagement:

Increase engagement with stakeholders throughout the project to gather continuous feedback and ensure their needs are met. Enhances stakeholder satisfaction and aligns the project more closely with their expectations and requirements.

Additional responses:

- **Risk Management:** Implement a robust risk management plan that identifies potential risks early and develops strategies to mitigate them. This reduces the likelihood of project disruptions and helps in managing unexpected challenges more effectively.
- Enhanced Project Planning: Submit a comprehensive project plan earlier in the project lifecycle, including detailed timelines, responsibilities, and milestones. This ensures that all stakeholders have a clear understanding of the project's direction and can track progress effectively.



Assessment checklist:

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

Task 1	Complete role play	
Task 2	Draft Scope Management Plan and email it to stakeholders	
Task 3	Complete tableWrite an email with your findings	
Task 4	Update Scope Management Plan and email it to stakeholders	
Task 5	Write an email based on audit findings	
Task 6	Respond to 2 questions related to the scenario provided	



Congratulations, you have reached the end of Assessment 2!

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