

# THC04 CARAVAN TRAINING PACKAGE

## VOLUME 3: GENERAL COMPETENCY STANDARDS

### ALL SECTORS

This is the third of four volumes which comprise the endorsed components of the Caravan Industry Training Package. This volume must be used in conjunction with other relevant volumes, as follows:

Volume 1	Qualifications, Assessment Guidelines and Supporting Information
Volume 2	General Competency Standards all sectors
Volume 4	Competency Standards for Manufacturing, Servicing, Retailing and Caravan Parks



**© Australian National Training Authority (ANTA), 2004**

This work has been produced with the assistance of funding provided by the Commonwealth Government through ANTA.

- An individual may make a photocopy of all or part of the work for their personal use.
- A Registered Training Organisation may make photocopies of all or part of the work for the teaching purposes of that organisation, including for supply to its students provided that any consideration does not exceed the marginal cost of preparation, reproduction, assembly and delivery.

Except as permitted under the *Copyright Act 1968*, all other rights are reserved. Requests for permission may be directed to:

Australian National Training Authority

Level 11, AMP Place

10 Eagle Street

BRISBANE, QLD 4000

Phone: (07) 3246 2300 Fax: (07) 3246 2490

This work is the result of wide consultations with Australian industry participants. It is a collaborative view and does not necessarily represent the view of ANTA or any specific body. For the sake of brevity it may omit factors which could be pertinent in particular cases.

While care has been taken in the preparation of this Training Package, ANTA and the original developer do not warrant that any licensing or registration requirements specified here are either complete or up-to-date for your State or Territory. ANTA and the original developer do not accept any liability for any damage or loss (including indirect and consequential loss) incurred by any person as a result of relying on the information contained in this Training Package.

This Training Package should not be regarded as professional advice and it should not be relied upon in any important matter without obtaining appropriate advice relevant to your circumstances.

Published by: Australian Training Products Ltd

Level 25, 150 Lonsdale St

Melbourne 3000

Phone: +61 3 96550600 Fax: +61 3 96394684

[www.atpl.net.au](http://www.atpl.net.au) e-mail: [sales@atpl.net.au](mailto:sales@atpl.net.au)

First published: February 2004

Stock Code Number: atp9159

ISBN: 0 642 80072 3

THC04 Caravan Industry Training Package V1 (CD Rendition)

Printed by: Mercury Printteam, Melbourne, Australia

AESharenet Code: P

Print Version No: 1

27/02/2004

# Table of Contents

<b>Section One</b>	<b>Introduction</b>
<b>Section Two</b>	<b>Qualifications</b>
<b>Section Three</b>	<b>Assessment Guidelines</b>
<b>Section Four</b>	<b>Competency Standards</b>
<b>Section Five</b>	<b>Supporting Information</b>

## **Appendices**

### **Appendix A:**

Relationship between Qualifications and Units of Competence in THC99 (old) and THC04 (new)

### **Appendix B:**

Australian Qualifications Descriptors

### **Appendix C:**

Caravan Industry Competency Standards: AQF Packaging and Summary of Content

### **Appendix D:**

Caravan Industry Competency Standards: Pre-requisite Units

### **Appendix E**

Relationship to Other Industry Competency Standards

### **Appendix F:**

Australia and Overseas Equivalences

### **Appendix G:**

Caravan Industry Training Packages: Suggested Equipment and Resource Lists

### **Appendix H**

Glossary

## **IMPORTANT NOTE TO USERS**

Training Packages are not static documents; they are amended periodically to reflect the latest industry practices and are version controlled. It is essential that the latest version is always used.

Check the version number before commencing training or assessment

The version number of this Training Package is located below the copyright statement on the imprint page (the page after the title page). Check whether this is the latest version by going to the National Training Information Service ([www.ntis.gov.au](http://www.ntis.gov.au)) and locating information about the Training Package. Alternatively, the number of the latest version can be provided by: Tourism Training Australia (<http://www.tourismtraining.com.au/>).

### **Version number conventions**

The primary release Training Package is Version 1. When changes are made to a Training Package, sometimes the version number is changed and sometimes it is not, depending on the extent of the change. When a Training Package is reviewed it is considered to be a new Training Package for the purposes of version control, and is Version 1. Do not confuse the version number with the Training Package's national code (which remains the same during its period of endorsement).

### **Explanation of the review date**

The review date (shown on the title page and in the footer of each page) indicates when the Training Package is expected to be reviewed in the light of changes such as changing technologies and circumstances. The Training Package review date is not an expiry date. Endorsed Training Packages and their components remain current until they are reviewed or replaced.

### Version Modification History Table

The version details of this endorsed Training Package are in the Version Modification History Table below. The latest information is at the top of the table.

Sheet: 1 of 1		
Version	Release Date	Comments
1	27/02/2004	Primary Release revised versions
	1999	THC99 - Original version

## List of Qualifications in the Caravan Industry Training Package

<b>National Codes and Titles</b>	
THT10102	Certificate I in Tourism (Australian Indigenous Culture)
<b>Recreational Vehicle Manufacturing</b>	
THC20104	Certificate II in Recreational Vehicle Manufacturing
THC30104	Certificate III in Recreational Vehicle Manufacturing
THC40104	Certificate IV in Recreational Vehicle Manufacturing
THC50104	Diploma of Recreational Vehicle Manufacturing
<b>Recreational Vehicle Servicing</b>	
THC20204	Certificate II in Recreational Vehicle Servicing
THC30204	Certificate III in Recreational Vehicle Servicing
THC40204	Certificate IV in Recreational Vehicle Servicing
<b>Recreational Vehicle and Accessories Retailing</b>	
THC20304	Certificate II in Recreational Vehicle and Accessories Retailing
THC30304	Certificate III in Recreational Vehicle and Accessories Retailing
THC40304	Certificate IV in Recreational Vehicle and Accessories Retailing
<b>Caravan Parks</b>	
THC20404	Certificate II in Caravan Park Operations
THC30404	Certificate III in Caravan Park Operations
THC40404	Certificate IV in Caravan Park Supervision
THC50404	Diploma of Caravan Park Management

# List of Units of Competency

## VOLUME TWO

### Common Core (Caravans)

Unit Code	Unit Title
THHCOR01B	Work with colleagues and customers
THHCOR03B	Follow health, safety and security procedures
THCCOR04B	Develop and Update Caravan Industry Knowledge
THCCOR05B	Plan and organise daily work

### Customer Service, Sales and Marketing

THHGCS01B	Develop and Update Local Knowledge
THHGCS02B	Promote products and services to customers
THHGCS03B	Deal with conflict situations
THHGCS04B	Make presentations
THHGCS05B	Organise in-house functions
THHGCS06B	Plan and implement sales activities
THHGCS07B	Co-ordinate marketing activities
THHGCS08B	Establish and conduct business relationships
THTSMA01B	Co-ordinate the production of brochures and marketing materials
THTSMA02B	Create a promotional display / stand

### Hygiene, Health, Safety and Security

THHGH01B	Follow workplace hygiene procedures
THHGH02B	Clean premises and equipment
THHGH03B	Provide first aid
THHGH11A	Manage casualty in a remote area
THCGHS04B	Handle hazardous materials safely
THCGHS06B	Meet OH&S requirements associated with electrical work
THCGHS08B	Respond to emergencies
THCGHS09B	Tow a recreational vehicle safely
UTE NES209B	Attach flexible cords & plugs to electrical equipment to 250 volt supply
UTGNGS204A	Fill gas cylinders
THHADTHS01B	Plan and conduct evacuation of premises

### Quality Assurance

THCGQA01B	Apply quality standards and procedures
THCGQA02B	Develop, implement and monitor quality standards and procedures

### General Administration

THHGGA01B	Communicate on the telephone
THHGGA02B	Perform office procedures
THHGGA03B	Source and present information
THHGGA04B	Prepare business documents
THHGGA05B	Plan and manage meetings
THHGGA06B	Receive and store stock
THHGGA07B	Control and order stock
THHGGA10B	Monitor and obtain materials and services

## Financial Administration

THHGFA01B	Process financial transactions
THHGFA02B	Maintain financial records
BSBADM309A	Process accounts payable and receivable
BSBADM308A	Process payroll
BSBADM310A	Maintain a general ledger
THHGFA06A	Interpret financial information
BSBADM505A	Manage payroll
BSBADM408A	Prepare financial reports

## Computer Technology

BSBCMN108A	Develop keyboard skills
BSBCMN205A	Use business technology
BSBCMN213A	Produce simple word-processed documents
BSBCMN306A	Produce business documents
BSBADM304A	Design and develop text documents
BSBADM305A	Create and use databases
BSBADM306A	Create electronic presentations
BSBADM403A	Develop and use complex databases
BSBCMN214A	Create and use simple spreadsheets
BSBADM404A	Develop and use complex spreadsheets

## Merchandise Sales

WRRS1B	Sell products and services
WRRS2B	Advise on products and services
WRRCS2B	Apply point of sale handling procedures
WRRLP2B	Minimise theft
WRRM1B	Merchandise products

## Training and Assessment

THHGTR01B	Coach others in job skills
BSZ401A	Plan assessment
BSZ402A	Conduct assessment
BSZ403A	Review assessment
BSZ404A	Train small groups
BSZ405A	Plan and promote a training program
BSZ406A	Plan a series of training sessions
BSZ407A	Deliver training sessions
BSZ408A	Review training

## Supporting Technical Skills

THCSTS01A	Apply technical knowledge of recreational vehicle manufacturing to work activities
THCSTS02A	Use hand and power tools
THCSTS03A	Use small plant and equipment
THCSTS04A	Carry out measurements and calculations
THCSTS05A	Read and interpret plans and drawings for a recreational vehicle
THCSTS06A	Produce computer-aided designs (CAD) for a recreational vehicle
THCSTS07A	Carry out mechanised cutting
MEM5.12AB	Perform routine manual metal arc welding
MEM5.50AA	Perform routine gas metal arc welding



# VOLUME THREE

## Leadership and Management

### *Business Operations and Administration*

THHGLE01B	Monitor work operations
THHGLE02B	Implement workplace health, safety and security procedures
THHGLE03B	Develop and implement operational plans
THHGLE04B	Establish and maintain a safe and secure workplace
THHGA08B	Plan and establish systems and procedures
THHGA09B	Manage projects
THHGLE16B	Manage physical assets
THHGLE17B	Manage and purchase stock
THHGLE18B	Monitor and maintain computer systems
THHGLE19B	Develop and implement a business plan
THHGLE20B	Develop and update the legal knowledge required for business compliance
THHGLE22A	Manage risk

### *People Management*

THHGLE05B	Roster staff
THHGLE06B	Monitor staff performance
THHGLE07B	Recruit and select staff
THHGLE08B	Lead and manage people
THHGLE09B	Manage workplace diversity
THHGLE10B	Manage workplace relations
THHGLE21B	Provide mentoring support to business colleagues

### *Customer Service*

THHGLE11B	Manage quality customer service
THHGLE12B	Develop and manage marketing strategies

### *Financial Management*

THHGLE13B	Manage finances within a budget
THHGLE14B	Prepare and monitor budgets
THHGLE15B	Manage financial operations

## E-business

THHGCT04A	Participate in co-operative online marketing initiatives for the tourism industry
BSBEBUS501A	Evaluate e-business opportunities
BSBEBUS502A	Evaluate e-business models
BSBEBUS603A	Evaluate new technologies for business
BSBEBUS601A	Develop an e-business strategy
BSBEBUS602A	Develop an action plan for an e-business strategy
BSBEBUS504A	Implement an e-business strategy
BSBEBUS613A	Develop online customer service strategies
BSBEBUS614A	Build online customer loyalty
BSBEBUS408A	Implement and monitor delivery of quality customer service online
BSBEBUS604A	Develop a business website strategy
BSBEBUS507A	Manage the business aspects of a website
BSBEBUS407A	Review and maintain the business aspects of a website
THHGCT05A	Build and launch a website for a small business
CUFIMA01A	Produce and manipulate digital images

BSBEBUS521A	Plan e-marketing communications
BSBEBUS522A	Conduct e-marketing communications
BSBEBUS401A	Conduct online research
BSBEBUS516A	Manage online purchasing
BSBEBUS519A	Manage online sales systems
BSBEBUS520A	Manage online payments systems
BSBEBUS517A	Manage online inventory
BSBEBUS404A	Trade online
BSBEBUS405A	Conduct online financial transactions
ICAITS193A	Connect a workstation to the Internet
ICAITS017C	Maintain System Integrity
BSBEBUS302A	Use and maintain electronic mail system
BSBEBUS403A	Communicate electronically

### **Innovation**

THHICS01A	Contribute to workplace improvements
THHICS02A	Share ideas in the workplace
THHICS03A	Develop innovative ideas at work
THHICS04A	Originate and develop a concept
THHICS05A	Lead a team to foster innovation
THHICS06A	Create an innovative work environment
THHICS07A	Set up systems that support innovation

## VOLUME FOUR

### Recreational Vehicle Manufacturing

THCMAN01B	Build a recreational vehicle chassis
THCMAN02B	Build the floor for a recreational vehicle
THCMAN03B	Construct and install the walls and roof for a recreational vehicle
THCMAN04B	Install 12/24Volt DC cabling in a recreational vehicle
THCMAN05B	Install LP gas systems in a recreational vehicle
THCMAN06B	Install furniture and appliances in a recreational vehicle
THCMAN07B	Install and connect the low pressure water system within a recreational vehicle
THCMAN08B	Sheet, glaze and finish a recreational vehicle
THCMAN09B	Build furniture for a recreational vehicle
THCMAN10A	Assess and carry out non-structural modifications to the chassis of a recreational vehicle

### Recreational Vehicle Servicing

THCSER01B	Repair or service a recreational vehicle chassis
THCSER02B	Replace floorcoverings in a recreational vehicle
THCSER03B	Repair the walls and roof of a recreational vehicle
THCSER04B	Repair or replace 12/24 Volt DC cabling in a recreational vehicle
THCSER05B	Repair/service LP gas systems in a recreational vehicle
THCSER06B	Remove and re-install furniture and appliances in a recreational vehicle
THCSER07B	Service/repair the water system in a recreational vehicle
THCSER08B	Repair damaged sheeting and glazing of a recreational vehicle
THCSER09B	Repair furniture for a recreational vehicle
THCSER10A	Repair or service running gear for a recreational vehicle
THCSER11A	Assess and quote the job

### Recreational Vehicle and Accessories Retailing

THCRET01B	Plan and construct an outdoor marketing display
WRRM3B	Co-ordinate merchandise presentation
WRR01B	Manage merchandise and store presentation
WRR14B	Buy merchandise
WRRLP4B	Maintain store security

### Caravan Park Office

THHCOR02B	Work in a socially diverse environment
THTTCO01B	Develop and update tourism industry knowledge
THHBFO02B	Provide accommodation reception services
THHGCS01B	Develop and update local knowledge
THHGCS03B	Deal with conflict situations
THTSOP01B	Operate an automated information system
THTSOP03B	Access and interpret product information
THTSOP04B	Sell tourism products and services
THTSOP06B	Receive and process reservations
THTSOP07B	Book and co-ordinate supplier services
THTSOP08B	Operate a computerised reservations system
THTPPD02B	Research tourism data
THTPPD03B	Source and package tourism products and services

THTPPD04B	Plan and implement minimal impact operations
THTPPD12B	Develop host community awareness of tourism
THTPPD13B	Assess tourism opportunities for local communities
THTFTG07B	Research and share general information on indigenous Australian cultures
THTFTG08B	Interpret aspects of local Australian indigenous culture
THCGCS09A	Organise in-house recreational activities
THHBH01B	Provide housekeeping services to guests
THHBH03B	Prepare rooms for guests

### **Parks Grounds and Maintenance**

THTGTM01B	Carry out general maintenance
THTGTM02B	Carry out grounds maintenance
THTGTM03C	Monitor pool water quality
THTGTM04B	Carry out specialist maintenance and construction
THTGTM05C	Supervise maintenance operations
THCGTM06B	Use, transport and store chemicals and biological agents
THCGTM07B	Install and/or modify irrigation systems
THCGTM08B	Operate irrigation systems
THCGTM09A	Provide turf care
THCGTM10A	Control weeds, plant pests and diseases
THCGTM11A	Collect waste or recyclables
THCGTM12A	Operate tractors, machinery and equipment
RTC2304A	Operate and maintain chainsaws
TDTB397B	Carry out vehicle servicing and maintenance
RTC2026A	Undertake propagation activities
RTF3036A	Plan and establish planted displays
RTF2017A	Prune shrubs and small trees
RTC2005A	Fell small trees
RTF2208A	Lay paving
THCGTM13A	Construct timber, concrete or modular structures
THCGTM14A	Set out landscape works
THCGTM15A	Plan and implement environmentally responsible practices
THCGTM16A	Develop and implement a grounds maintenance program
RTC4905A	Cost a project
THTPPD06B	Plan and develop ecologically sustainable tourism operations

## Summary Mapping to Previous Training Package

Current	Previous
THT10102: Certificate I in Tourism (Australian Indigenous Culture)	
THC20104 Certificate II in Recreational Vehicle Manufacturing	THC20199 Certificate II in Recreational Vehicle Manufacturing
THC30104 Certificate III in Recreational Vehicle Manufacturing	THC30199 Certificate III in Recreational Vehicle Manufacturing
THC40104 Certificate IV in Recreational Vehicle Manufacturing	THC40199 Certificate IV in Recreational Vehicle Manufacturing
THC50104 Diploma of Recreational Vehicle Manufacturing	
THC20204 Certificate II in Recreational Vehicle Servicing	THC20299 Certificate II in Recreational Vehicle Servicing
THC30204 Certificate III in Recreational Vehicle Servicing	THC30299 Certificate III in Recreational Vehicle Servicing
THC40204 Certificate IV in Recreational Vehicle Servicing	THC40299 Certificate IV in Recreational Vehicle Servicing
THC20304 Certificate II in Recreational Vehicle and Accessories Retailing	THC20399 Certificate II in Recreational Vehicle and Accessories Retailing
THC30304 Certificate III in Recreational Vehicle and Accessories Retailing	THC30399 Certificate III in Recreational Vehicle and Accessories Retailing
THC40304 Certificate IV in Recreational Vehicle Retailing	THC40399 Certificate IV in Recreational Vehicle and Accessories Retailing
	THC10199 Certificate I in Caravan Park Operations
THC20404 Certificate II in Caravan Park Operations	THC20499 Certificate II in Caravan Park Operations
THC30404 Certificate III in Caravan Park Operations	THC30499 Certificate III in Caravan Park Operations
THC40404 Certificate IV in Caravan Park Supervision	THC40499 Certificate IV in Caravan Park Supervision
THC50404 Diploma of Caravan Park Management	THC50199 Diploma of Caravan Park Management

Details of specific changes to qualifications and competency standards are found in Appendix A

# Leadership & Management

**COMPETENCY STANDARDS FOR THE CARAVAN  
INDUSTRY TRAINING PACKAGE**



# CONTENTS

<b>LEADERSHIP &amp; MANAGEMENT</b>	<b>1</b>
<b>THHGLE01B</b>	<b>MONITOR WORK OPERATIONS 1</b>
<b>THHGLE02B</b>	<b>IMPLEMENT WORKPLACE HEALTH, SAFETY AND SECURITY PROCEDURES 5</b>
<b>THHGLE03B</b>	<b>DEVELOP AND IMPLEMENT OPERATIONAL PLANS 9</b>
<b>THHGLE04B</b>	<b>ESTABLISH AND MAINTAIN A SAFE AND SECURE WORKPLACE 13</b>
<b>THHGGA08B</b>	<b>PLAN AND ESTABLISH SYSTEMS AND PROCEDURES 17</b>
<b>THHGGA09B</b>	<b>MANAGE PROJECTS 20</b>
<b>THHGLE16B</b>	<b>MANAGE PHYSICAL ASSETS 25</b>
<b>THHGLE17B</b>	<b>MANAGE AND PURCHASE STOCK 29</b>
<b>THHGLE18B</b>	<b>MONITOR AND MAINTAIN COMPUTER SYSTEMS 34</b>
<b>THHGLE19B</b>	<b>DEVELOP AND IMPLEMENT A BUSINESS PLAN 39</b>
<b>THHGLE20B</b>	<b>DEVELOP AND UPDATE THE LEGAL KNOWLEDGE REQUIRED FOR BUSINESS 45</b>
<b>COMPLIANCE</b>	<b>45</b>
<b>THHGLE22A</b>	<b>MANAGE RISK 49</b>
<b>THHGLE05B</b>	<b>ROSTER STAFF 53</b>
<b>THHGLE06B</b>	<b>MONITOR STAFF PERFORMANCE 56</b>
<b>THHGLE07B</b>	<b>RECRUIT AND SELECT STAFF 60</b>
<b>THHGLE08B</b>	<b>LEAD AND MANAGE PEOPLE 64</b>
<b>THHGLE09B</b>	<b>MANAGE WORKPLACE DIVERSITY 68</b>
<b>THHGLE10B</b>	<b>MANAGE WORKPLACE RELATIONS 72</b>
<b>THHGLE21B</b>	<b>PROVIDE MENTORING SUPPORT TO BUSINESS COLLEAGUES 76</b>
<b>THHGLE11B</b>	<b>MANAGE QUALITY CUSTOMER SERVICE 79</b>
<b>THHGLE12B</b>	<b>DEVELOP AND MANAGE MARKETING STRATEGIES 83</b>
<b>THHGLE13B</b>	<b>MANAGE FINANCES WITHIN A BUDGET 88</b>
<b>THHGLE14B</b>	<b>PREPARE AND MONITOR BUDGETS 92</b>
<b>THHGLE15B</b>	<b>MANAGE FINANCIAL OPERATIONS 97</b>





## THHGLE01B Monitor work operations

### Unit Descriptor

This unit deals with the skills and knowledge required to oversee and monitor the quality of day-to-day work operations within a tourism or hospitality context. As such it includes the fundamental knowledge of management roles and responsibilities. team leaders, supervisors or managers would carry out the roles covered in this unit.

Element	Performance Criteria
<b>1 Monitor and improve workplace operations</b>	<ul style="list-style-type: none"><li>1.1 Monitor efficiency and service levels on an ongoing basis through close contact with day-to-day operations.</li><li>1.2 Ensure that operations in the workplace support overall enterprise goals and quality assurance initiatives.</li><li>1.3 Identify quality problems and issues promptly and make appropriate adjustments accordingly with relevant approvals.</li><li>1.4 Adjust procedures and systems in consultation with colleagues to improve efficiency and effectiveness.</li><li>1.5 Consult colleagues about ways to improve efficiency and service levels.</li></ul>
<b>2 Plan and organise workflow</b>	<ul style="list-style-type: none"><li>2.1 Assess current workload of colleagues accurately.</li><li>2.2 Schedule work in a manner that enhances efficiency and customer service quality.</li><li>2.3 Delegate work to appropriate people in accordance with principles of delegation.</li><li>2.4 Assess workflow and progress against agreed objectives and timelines.</li><li>2.5 Assist colleagues in prioritisation of workload through supportive feedback and coaching.</li><li>2.6 Provide timely input to appropriate management regarding staffing needs.</li></ul>
<b>3 Maintain workplace records</b>	<ul style="list-style-type: none"><li>3.1 Complete workplace records accurately and submit within required timeframes.</li><li>3.2 Where appropriate, delegate and monitor completion of records prior to submission.</li></ul>

<b>4 Solve problems and make decisions</b>	4.1	Identify workplace problems promptly and analyse from an operational and customer service perspective.
	4.2	Initiate short-term action to resolve the immediate problem where appropriate.
	4.3	Analyse problems for any long-term impact, and assess and action potential solutions in consultation with relevant colleagues.
	4.4	Where a team member raises problem, encourage the individual's participation in solving the problem.
	4.5	Take follow-up action to monitor the effectiveness of solutions in the workplace.

### Range Statement

This unit may apply to various staff in all tourism and hospitality sectors. The following explanations identify how this unit may be applied in different workplaces, sectors and circumstances.

For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs.

Procedures and systems may relate to:

- customer service
- bar and restaurant operations
- kitchens
- office administration
- reservation procedures
- housekeeping systems
- stock control
- security
- safe work practices
- record keeping
- financial procedures.

Quality assurance initiatives may be formal or informal.

Problems may include:

- difficult customer service situations
- equipment breakdown/technical failure
- failure to deliver promised service to customers
- procedural inadequacies or failures
- unrealistic or impractical product development or marketing resulting in operational difficulties
- inadequate staffing
- poor rostering
- inadequate financial resources
- delays and time difficulties.

Workplace records may include:

- staff records
- regular performance reports.

## **Evidence Guide**

### **Essential Knowledge and Skills to be Assessed**

Knowledge of and skills in the following areas must be assessed as part of this unit:

- leadership and management roles and responsibilities within the relevant industry sector
- key concepts of quality assurance and how this is managed and implemented in the workplace
- typical work organisation and work planning methods appropriate to the industry sector
- time management principles and their application to leaders and managers
- principles of effective delegation
- problem solving and decision making processes and techniques and their application to typical workplace issues
- features of relevant record-keeping systems as appropriate to the industry sector
- industrial and/or legislative issues that affect short term work organisation as appropriate to the industry sector.

### **Linkages to Other Units**

There is a link between this unit and a range of other leadership units, as this unit underpins the leadership function. Depending upon the industry sector and workplace, combined training and assessment may be appropriate. Examples include:

- THHGLE08B Lead and manage people
- THHGLE02B Implement workplace health, safety and security procedures
- THHGLE03B Develop and implement operational plans

Note that problem solving is included in both this unit and unit THHGCS03B Deal with conflict situations. Care should be taken to avoid duplication in training and assessment.

Note: Knowledge of specific legal issues is required within this unit. This means that there is some duplication with the generic unit THHGLE20B Develop and update the legal knowledge required for business compliance. Repetition should be avoided in training and assessment.

### **Critical Aspects of Assessment**

Evidence of the following is critical:

- ability to monitor effectively and respond to a range of common operational and service issues in the workplace
- understanding of the role of staff involved in workplace monitoring
- knowledge of quality assurance, workflow planning, delegation and problem solving.

### **Context of Assessment and Resource Implications**

Assessment must ensure:

- project or work activities conducted over a period of time so that the monitoring aspects of the unit can be assessed
- projects and work activities that reflect current industry practice and operations
- involvement of a team for which the candidate is able to plan and organise workflow.

## Assessment Methods

Assessment methods must be chosen to ensure that day-to-day oversight of a project or activity can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- evaluation of a project or work activity conducted by the candidate
- evaluation of reports prepared by the candidate detailing the methods used to monitor a given project or activity
- case studies and problem-solving exercises to assess ability to develop approaches to different workplace situations and problems
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

## Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform    Level 2 = Administer and Manage    Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	3	Gathering information over a period of time on customer satisfaction levels and assessing possible courses of action
Communicating Ideas and Information	3	Communicating and negotiating with senior management about why change may be required in an operational area
Planning and Organising Activities	3	Assessing the amount of time required for particular tasks to inform workflow organisation
Working with Others and in Teams	3	Delegating effectively and providing appropriate support to colleagues
Using Mathematical Ideas and Techniques	1	Calculating staff timesheets
Solving Problems	3	Analysing and adjusting an operational procedure to ensure more effective customer service
Using Technology	2	Adapting the way computerised information systems are used to facilitate improved communication with colleagues

## **THHGLE02B**

# **Implement workplace health, safety and security procedures**

### **Unit Descriptor**

This unit deals with the skills and knowledge required to implement health, safety and security procedures in the workplace, which is often carried out by team leaders and supervisors.

<b>Element</b>	<b>Performance Criteria</b>
<b>1 Provide information on health, safety and security</b>	<p>1.1 Explain relevant Occupational Health and Safety (OH&amp;S) information, including enterprise specific details, accurately and clearly to staff.</p> <p>1.2 Make all OH&amp;S information readily accessible to staff in a timely and regular manner.</p>
<b>2 Co-ordinate staff participation in health, safety and security issues</b>	<p>2.1 Provide the opportunity for all staff members to contribute to the management of health, safety and security in the workplace.</p> <p>2.2 Action, resolve or refer to the appropriate person issues raised through consultation on OH&amp;S.</p> <p>2.3 Provide timely feedback on OH&amp;S management systems to the designated person in accordance with enterprise procedures.</p>
<b>3 Implement and monitor procedures for controlling hazards and risks</b>	<p>3.1 Identify and report workplace hazards and risks promptly through maintenance of close contact with day-to-day operations in the workplace.</p> <p>3.2 Implement and monitor control procedures in accordance with enterprise and legislative requirements.</p> <p>3.3 Identify inadequacies in control measures promptly and resolve or report them to the appropriate person.</p>

<b>4</b>	<b>Implement and monitor health, safety and security training</b>	4.1	Identify OH&S training needs accurately based on regular workplace monitoring.
		4.2	Make timely arrangements for fulfilling training needs in consultation with appropriate management and in accordance with enterprise policy.
		4.3	Monitor effectiveness of training in the workplace and make adjustments as required.
<b>5</b>	<b>Maintain health, safety and security records</b>	5.1	Complete records accurately and legibly and store in accordance with enterprise and legal requirements.
		5.2	Use data to provide reliable and timely input to the management of workplace health, safety and security.

### Range Statement

This applies to all tourism and hospitality sectors. The following explanations identify how this unit may be applied in different workplaces, sectors and circumstances.

For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs.

Relevant OH&S information may include information on:

- roles and responsibilities of employers and employees
- legal obligations and ramifications of failure to comply
- participative arrangements for OH&S
- location of First Aid kit
- procedures for specific workplace situations
- specific risks and control measures relevant to the workplace
- specific regulations and codes of practice
- OH&S training information
- OH&S updates.

Hazards and risks may include:

- workplace sickness
- fire
- crowd-related risks
- accidents
- bomb scares
- theft and armed robbery
- deranged customers
- equipment failure
- weather emergencies
- pests.

## Evidence Guide

### Essential Knowledge and Skills to be Assessed

Knowledge of and skills in the following areas must be assessed as part of this unit:

- working knowledge of relevant State/Territory occupational health and safety legislation, specifically:
  - duty of care
  - requirements for record keeping
  - provision of information and training
  - regulations and codes of practice in relation to hazards in work area
  - health and safety representatives and OH&S committees
  - issue resolution
- knowledge of specific enterprise policy and procedures for OH&S issues.

### Linkages to Other Units

There is a link between this unit and a range of other units. Depending upon the industry sector and workplace, combined delivery/assessment may be appropriate. Examples may include:

- THHGLE04B Establish and maintain a safe and secure workplace
- THHGLE01B Monitor workplace operations
- THHGLE03B Develop and implement operational plans

Combined training and assessment with unit THHGLE04B Establish and maintain a safe and secure workplace is strongly recommended.

Note: Knowledge of specific legal issues is required within this unit. This means that there is some duplication with the generic unit THHGLE20B Develop and update the legal knowledge required for business compliance. Repetition should be avoided in training and assessment.

### Critical Aspects of Assessment

Evidence of the following is critical:

- ability to monitor health, safety and security within the context of an established system where policies, procedures and programs to control OH&S already exist
- knowledge of health and safety legislation as specified under “Knowledge and Skills to be Assessed”.

### Context of Assessment and Resource Implications

Assessment must ensure:

- project or work activities that reflect current industry practice and operations
- project or work activities conducted over a period of time so that the implementation and monitoring aspects of the unit can be assessed
- involvement of a team operating in a specified workplace for which the candidate co-ordinates OH&S issues.

### Assessment Methods

Assessment methods must be chosen to ensure that the skills to implement OH&S procedures can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.



The following examples are appropriate for this unit:

- evaluation of reports prepared by the candidate detailing how OH&S issues were addressed in a given project or work activity
- evaluation of projects conducted by the candidate to address OH&S issues in a given workplace
- case studies and problem-solving exercises to develop OH&S responses to different workplace situations
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

### **Key Competencies in this Unit**

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform    Level 2 = Administer and Manage    Level 3 = Design and Evaluate

<b>Key Competencies</b>	<b>Level</b>	<b>Examples</b>
Collecting, Organising and Analysing Information	3	Evaluating the OH&S training needs of staff, researching improved office furniture
Communicating Ideas and Information	3	Providing a staff briefing on OH&S issues, reporting on OH&S issues to management
Planning and Organising Activities	3	Organising a risk audit in the workplace
Working with Others and in Teams	3	Pro-actively seeking feedback on OH&S issues from colleagues
Using Mathematical Ideas and Techniques	1	Calculating regularity requirements for OH&S training
Solving Problems	3	Developing a possible solution to a situation where staff may be breaching an OH&S requirement
Using Technology	1	Using an electronic update to inform colleagues about current OH&S information

## **THHGLE03B                      Develop and implement operational plans**

### **Unit Descriptor**

This unit deals with the skills and knowledge required to undertake workplace planning. It focuses the skills needed by frontline managers to develop and implement a range of planning initiatives. As such the unit focuses on key planning skills and underpins a range of other leadership units which deal with planning in specific contexts.

<b>Element</b>	<b>Performance Criteria</b>
<b>1      Develop operational plans</b>	<ul style="list-style-type: none"><li>1.1      Develop plans and strategies based on monitoring of workplace needs and identification of opportunities for improvement and innovation.</li><li>1.2      Develop scope and objectives of the required initiative based on enterprise goals, staff and customer feedback.</li><li>1.3      Identify and analyse internal and external factors that may impact on the plan.</li><li>1.4      Consult appropriate colleagues during the development of the plan.</li><li>1.5      Develop appropriate and financially-sound resource strategies.</li><li>1.6      Develop administrative framework and systems capable of supporting the planned initiative.</li><li>1.7      Identify and communicate clearly all priorities, responsibilities and timelines.</li><li>1.8      Develop evaluation systems in consultation with appropriate colleagues.</li><li>1.9      Develop an internal and external communications strategy to keep all stakeholders informed.</li></ul>
<b>2      Administer and monitor operational plans</b>	<ul style="list-style-type: none"><li>2.1      Implement and monitor identified actions in accordance with agreed priorities.</li><li>2.2      Provide support and assistance to colleagues involved in implementing the plan.</li><li>2.3      Provide progress and other reports in accordance with enterprise requirements.</li><li>2.4      Make assessment of the need for additional resource requirements and take appropriate action in accordance with enterprise policy.</li></ul>

<b>3      Conduct ongoing evaluation</b>	3.1	Use agreed evaluation methods to assess effectiveness in the workplace.
	3.2	Involve all appropriate colleagues in the evaluation.
	3.3	Identify problems and make adjustments accordingly.
	3.4	Incorporate the results of evaluation into ongoing planning and operational management.

## Range Statement

This unit applies to all tourism and hospitality sectors. The following explanations identify how this unit may be applied in different workplaces, sectors and circumstances.

For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs.

The term “operational plans” can be interpreted as any plan that may be required to support day-to-day workplace operations. Examples may include plans related to:

- introduction of a new product
- staff re-organisation
- impacts of marketing initiatives or campaigns
- an office relocation or refurbishment
- upgrading of facilities
- changes in work practices or procedures
- business expansion or contraction
- introduction of new systems.

Resource strategies may relate to:

- human
- financial
- physical.

Internal and external factors to be analysed may include:

- capabilities and resources
  - human resources
  - financial resources
  - equipment capacity
  - staff skill levels
  - hours of operation
  - communication capabilities
  - location/position.
- trends and developments in the marketplace
  - economic
  - ecological/environmental
  - government activities
  - social and cultural
  - demographic
  - technology

- industrial.
- comparative market information
- best practice information
- benchmarking
- competitor information.
- legal and ethical constraints
- legislation
- regulation
- codes of practice
- cultural expectations and influences
- social responsibilities (eg. protection of children, environmental issues).

Evaluation systems may be qualitative or quantitative and may relate to:

- sales figures and targets
- occupancy levels
- customer or staff feedback
- productivity gains.

## **Evidence Guide**

### **Essential Knowledge and Skills to be Assessed**

Knowledge of and skills in the following areas must be assessed as part of this unit:

- key planning concepts and techniques including the structure of plans and steps in the planning process
- current internal and external environments which impact on planning within the enterprise or industry sector
- research skills sufficient to source and analyse a broad range of information on varying issues and from multiple sources
- legal issues that impact on enterprise operations as appropriate to the industry sector.

### **Linkages to Other Units**

This unit must be assessed with or after the following units. These units describe skills and knowledge that are essential to this unit of competence:

- THHGLE01B Monitor work operations

This unit relates to general planning skills. As such combined training and assessment with a wide range of other leadership units may be appropriate. These units should be selected according to the needs of the specific sector and workplace but could include:

- THHGLE08B Lead and manage people
- THHGLE14B Prepare and monitor budgets

Note: Knowledge of specific legal issues is required within this unit. This means that there is some duplication with the generic unit THHGLE20B Develop and update the legal knowledge required for business compliance. Repetition should be avoided in training and assessment.

### **Critical Aspects of Assessment**

Evidence of the following is critical:

- ability to develop a plan for a specific tourism and/or hospitality context which identifies current and relevant industry and enterprise issues and includes clear action plans and evaluation mechanisms

- management skills demonstrated through effective implementation of the plan, including the ability to respond to changing circumstances encountered in the implementation phase
- knowledge and understanding of current legal issues and general industry issues which affect general operations within the sector.

### Context of Assessment and Resource Implications

Assessment must ensure:

- project or work activities conducted over a period of time so that the implementation and monitoring aspects of the unit can be assessed
- projects and work activities that reflect current industry practice and operations
- involvement of multiple stakeholders to ensure consultation processes are included.

### Assessment Methods

Assessment methods must be chosen to ensure that planning and related management skills can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- evaluation of a plan prepared by the candidate plus an evaluation of the implementation and evaluation phase to assess ongoing monitoring aspects of the unit
- evaluation of reports prepared by the candidate detailing the plan, how the planning process was undertaken, the ways in which implementation and evaluation of the plan were carried out and the lessons learned to inform future project planning
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

### Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform    Level 2 = Administer and Manage    Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	3	Undertaking and reporting on a staff consultation process in relation a re-organisation of work space
Communicating Ideas and Information	3	Developing an action plan document clearly outlining roles, responsibilities, resources and timelines
Planning and Organising Activities	3	Creating and overseeing the implementation of system to automate all client files
Working with Others and in Teams	3	Co-ordinating a team meeting to agree roles and responsibilities in relation to a given initiative
Using Mathematical Ideas and Techniques	1	Calculating time required for completion of specific tasks and creating timelines accordingly
Solving Problems	3	Making adjustments to an action plan due to a reduction in human and financial resources
Using Technology	2	Using project management software

## **THHGLE04B**

# **Establish and maintain a safe and secure workplace**

### **Unit Descriptor**

This unit deals with the skills and knowledge required to manage health, safety and security issues within a tourism or hospitality context. It focuses on the establishment and monitoring of frameworks, systems and procedures.

<b>Element</b>	<b>Performance Criteria</b>
<b>1 Establish and maintain a framework for health safety and security</b>	1.1 Develop and clearly articulate health, safety and security policies in enterprise policy documents.
	1.2 Define and allocate health, safety and security responsibilities clearly including relevant information in job descriptions and duty statements.
	1.3 Identify, seek or provide adequate financial and human resources to address workplace safety issues.
	1.4 Provide and explain information on occupational health and safety systems and procedures in a form readily accessible to employees.
	1.5 Develop and implement an occupational health and safety training program.
	1.6 Establish and monitor a system for keeping occupational health and safety records.
<b>2 Establish and maintain participative arrangements for the management of health, safety and security</b>	2.1 Establish and maintain appropriate consultative processes.
	2.2 Resolve issues raised through participation and consultation promptly and effectively.
	2.3 Provide information about the outcomes of participation and consultation in a manner accessible to employees.

<b>3</b>	<b>Establish and maintain procedures for identifying, assessing and controlling hazards and risks</b>	3.1	Identify and assess existing and potential hazards in the workplace.
		3.2	Develop procedures for ongoing identification, assessment and control of risks and integrate this within work systems and procedures.
		3.3	Develop and implement measures to control assessed risks, including interim solutions where necessary.
		3.4	Monitor activities to ensure that procedures for risk assessment and control are adopted.
		3.5	Address the issues of hazard identification, risk assessment and control at the planning, design and evaluation stages of any change in the workplace to ensure that new hazards and risks are not created.
		3.6	Assess and control risks presented by identified hazards in accordance with OH&S legislation and codes of practice.
<b>4</b>	<b>Evaluate the organisation's health, safety and security system</b>	4.1	Assess the effectiveness of the health, safety and security system and related policies, procedures and programs according to the organisation's aims with respect to occupational health and safety.
		4.2	Develop and implement improvements to the occupational health and safety system.
		4.3	Assess compliance with occupational health and safety legislation and codes of practice to ensure that legal occupational health and safety standards are maintained as a minimum.

## Range Statement

This unit applies to all tourism and hospitality sectors. The following explanations identify how this unit may be applied in different workplaces, sectors and circumstances.

For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs.

Health, safety and security policies must include consideration of:

- creation and maintenance of a healthy working environment
- product or service features and delivery
- use of equipment
- physical layout and design of the workplace
- furniture design and placement
- security issues

- emergency responses.

Monitoring of activities and processes may include:

- review of written reports
- performance appraisal
- interview with stakeholders
- auditing procedures.

Hazards and risks may include:

- workplace sickness
- fire
- crowd-related risks
- accidents
- bomb scares
- theft and armed robbery
- deranged customers
- equipment failure
- weather emergencies
- pests.

## **Evidence Guide**

### **Essential Knowledge and Skills to be Assessed**

Knowledge of and skills in the following areas must be assessed as part of this unit:

- detailed knowledge of relevant State/Territory occupational health and safety legislation as it affects specific workplace operations
- knowledge of the way systems and procedures on health safety and security issues link with other management systems
- the typical range of hazards and risks associated with business in a particular industry sector and measures that can be taken to address them
- other legal issues which impact on health and safety in particular industry contexts (eg. Responsible Service of Alcohol, Responsible Conduct of Gambling).

### **Linkages to Other Units**

This unit must be assessed with or after the following units. These units describe skills and knowledge essential to this unit of competence:

- THHGLE01B Implement workplace health, safety and security procedures

Combined training and assessment is strongly recommended.

There is also a strong link between this unit the following unit:

- THHGLE22B Manage risk

Note: Knowledge of specific legal issues is required within this unit. This means that there is some duplication with the generic unit THHGLE20B Develop and update the legal knowledge required for business compliance. Repetition should be avoided in training and assessment.

### **Critical Aspects of Assessment**

Evidence of the following is critical:

- ability to develop and monitor policies, systems and procedures health, safety and security system within a specific tourism or hospitality context
- knowledge of specific and relevant legislative requirements.



## Context of Assessment and Resource Implications

Assessment must ensure:

- development of policies, systems and procedures for a nominated workplace, activity or project and implementation within the relevant fully-operational commercial environment (eg. within an attraction or hotel)
- project or work activities conducted over a period of time so that the implementation and monitoring aspects of the unit can be assessed
- involvement of a team operating in a specified workplace for which the candidate establishes and monitors OH&S issues.
- application of current industry guidelines, codes of practice and legislation in relation to health, safety and security.

## Assessment Methods

Assessment methods must be chosen to ensure that skills in establishing and monitoring health, safety and security can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- evaluation of reports prepared by the candidate detailing how OH&S policies, systems and procedures were established and monitored in a given project or work activity
- evaluation of projects conducted by the candidate within industry to develop policies, systems and procedures for health, safety and security
- evaluation of the implementation and monitoring processes through interviews with key stakeholders or review of reports
- case studies and problem-solving exercises to establish policies, systems and procedures for different workplace situations
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

## Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform    Level 2 = Administer and Manage    Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	3	Conducting and reporting on a risk audit
Communicating Ideas and Information	3	Developing policy documents for OH&S-related issues
Planning and Organising Activities	3	Establishing and monitoring a consultation program to identify OH&S issues requiring attention in the workplace
Working with Others and in Teams	3	Providing training on OH&S issues
Using Mathematical Ideas and Techniques	2	Costing improvements for office furniture
Solving Problems	3	Consulting on and adjusting a long-established operational procedure to minimise risk
Using Technology	1	Using electronic communication mechanisms to consult with staff on OH&S issues

**THHGGA08B****Plan and establish systems and procedures****Unit Descriptor**

This unit deals with the skills and knowledge required to develop and implement new ways of doing things in the workplace. Supervisors or team leaders would usually carry out this role. It does not cover long term planning, but focuses only on short-term operational strategies to achieve workplace goals.

**Element****Performance Criteria**

<b>1 Plan and develop systems and procedures</b>	1.1	Identify the need for enterprise systems and procedures, and clarify enterprise requirements by monitoring the workplace and consulting with colleagues and customers on an ongoing basis.
	1.2	Identify problem areas and take prompt action to identify possible responses.
	1.3	Develop or revise systems and procedures in consultation with colleagues.
	1.4	Consider immediate operational needs and enterprise goals, and human and financial resource issues, when developing or revising systems and procedures.
<b>2 Establish systems and procedures</b>	2.1	Provide advance notice of new systems and procedures to colleagues.
	2.2	Introduce systems and procedures to the workplace in a manner that causes minimum disruption to customers and colleagues.
	2.3	Provide training and support to colleagues as required.
<b>3 Review systems and procedures</b>	3.1	Monitor the efficiency and effectiveness of systems and procedures introduced to the workplace.
	3.2	Seek suggestions for improvements to systems and procedures from colleagues at all levels.
	3.3	Make adjustments to systems and procedures where necessary.

## Range Statement

This unit applies to tourism and hospitality operations. The following explanations identify how this unit may be applied in different workplaces, sectors and circumstances.

For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs.

Systems and procedures may include:

- customer service procedures
- bar or restaurant procedures
- kitchen systems and procedures including Food Safety
- housekeeping systems
- office administration systems
- reservations procedures.
- cleaning and maintenance procedures
- quality assurance procedures
- security procedures
- stock control systems and procedures
- occupational health and safety procedures.

## Evidence Guide

### Essential Knowledge and Skills to be Assessed

- The following skills and knowledge must be assessed as part of this unit:
- knowledge of typical systems and procedures related to operational area
- types of security and control systems
- in-depth technical knowledge of the area in which systems/procedures are to be introduced
- in-depth knowledge of the context or enterprise including policy and goals, budgets, personnel, communication channels
- legislative framework within which the enterprise must operate.

### Linkages to Other Units

This is a unit that underpins effective performance in a range of other units. It is strongly recommended that this unit be delivered and assessed in conjunction with other relevant operational and service units such as:

- THHGLE01B Monitor work operations
- THHGLE07B Recruit and select staff
- THHGLE08B Lead and manage people

### Critical Aspects of Assessment

Evidence of the following is critical:

- accurate identification of workplace system and procedural needs
- ability to develop and implement appropriate systems/procedures within a specific tourism and hospitality industry environment.

## Context of Assessment and Resource Implications

Assessment must ensure:

- access to an industry enterprise or context under normal operating conditions in which the opportunity to develop, implement and review systems and procedures is provided
- project or work activities that allow the candidate to develop, implement and review systems and procedures over a period of time to address a specific workplace need.

## Assessment Methods

Assessment methods must be chosen to ensure that planning and establishing systems and/or procedures can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- projects to develop or review systems and procedures related to a particular enterprise or work context
- case studies to evaluate ability to solve problems and review systems or procedures
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate eg. systems and/or procedures developed for a particular work area.

## Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform    Level 2 = Administer and Manage    Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	2	Researching technical information to develop or review systems and procedures, seeking feedback from others on existing systems and procedures Analysing feedback, facts and opinions on existing or proposed systems and procedures
Communicating Ideas and Information	2	Identifying customer and colleague needs, relating effectively to individuals and groups
Planning and Organising Activities	3	Planning and organising systems and procedures for an enterprise, planning and organising a review of systems and procedures
Working with Others and in Teams	2	Working effectively with individuals and teams/groups to develop systems and procedures Ensuring the at systems and procedures developed meet requirements of others in teams
Using Mathematical Ideas and Techniques	2	May use mathematical skills depending on the work area and context in which the systems and procedures are being developed
Solving Problems	2	Examining and identifying problems or potential problems in proposed or existing systems and procedures
Using Technology	2	May use computer to develop plans and systems Area of procedures may involve use of technology such as reservations or ticketing systems

## THHGGA09B                      Manage projects

### Unit Descriptor

This unit deals with the skills and knowledge required to manage major projects within a tourism or hospitality industry environment. Managers and team leaders would generally undertake this role. This unit does not reflect the skills required by operational staff.

Element	Performance Criteria
<b>1      Plan project</b>	
	1.1      Develop the objectives and scope of the project in consultation with appropriate colleagues and customers.
	1.2      Determine and develop a resource strategy for the project.
	1.3      Evaluate the financial viability of the project through analysis of key factors.
	1.4      Plan and create an administrative structure for the project.
	1.5      Allocate project responsibilities in agreement with others, and clearly communicate responsibilities to all involved.
	1.6      Plan internal and external communications and public relations and marketing strategies together with appropriate colleagues.
	1.7      Reach agreement on suitable project evaluation methods.
	1.8      Develop an overall project management plan and communicate plan to appropriate colleagues.
	1.9      Identify key project milestones and communicate these to persons involved.

- |  |  |     |   |     |   |     |  |     |  |     |   |     |  |     |  |     |  |
|--|--|-----|---|-----|---|-----|--|-----|--|-----|---|-----|--|-----|--|-----|--|
| <b>2      Administer and monitor project</b> | <table border="0"><tr><td style="vertical-align: top; padding-right: 20px;">2.1</td><td>Implement project strategies and monitor them in conjunction with project team members.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">2.2</td><td>Provide support and assistance is provided to team members as required.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">2.3</td><td>Use effective interpersonal communication skills to build trust and respect within the project team.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">2.4</td><td>Assess progress against project goals and review progress in consultation with project team members.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">2.5</td><td>Determine the need for additional project resources and take action accordingly.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">2.6</td><td>Implement financial control systems and monitor in accordance with project guidelines.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">2.7</td><td>Provide regular reports on project progress to all appropriate colleagues/customers.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">2.8</td><td>Complete the project within agreed time lines.</td></tr></table> | 2.1 | Implement project strategies and monitor them in conjunction with project team members.       | 2.2 | Provide support and assistance is provided to team members as required.             | 2.3 | Use effective interpersonal communication skills to build trust and respect within the project team. | 2.4 | Assess progress against project goals and review progress in consultation with project team members. | 2.5 | Determine the need for additional project resources and take action accordingly.  | 2.6 | Implement financial control systems and monitor in accordance with project guidelines. | 2.7 | Provide regular reports on project progress to all appropriate colleagues/customers. | 2.8 | Complete the project within agreed time lines. |
| 2.1  | Implement project strategies and monitor them in conjunction with project team members.  |     |   |     |   |     |  |     |  |     |   |     |  |     |  |     |  |
| 2.2  | Provide support and assistance is provided to team members as required.  |     |   |     |   |     |  |     |  |     |   |     |  |     |  |     |  |
| 2.3  | Use effective interpersonal communication skills to build trust and respect within the project team.   |     |   |     |   |     |  |     |  |     |   |     |  |     |  |     |  |
| 2.4  | Assess progress against project goals and review progress in consultation with project team members.   |     |   |     |   |     |  |     |  |     |   |     |  |     |  |     |  |
| 2.5  | Determine the need for additional project resources and take action accordingly.   |     |   |     |   |     |  |     |  |     |   |     |  |     |  |     |  |
| 2.6  | Implement financial control systems and monitor in accordance with project guidelines.   |     |   |     |   |     |  |     |  |     |   |     |  |     |  |     |  |
| 2.7  | Provide regular reports on project progress to all appropriate colleagues/customers.   |     |   |     |   |     |  |     |  |     |   |     |  |     |  |     |  |
| 2.8  | Complete the project within agreed time lines.   |     |   |     |   |     |  |     |  |     |   |     |  |     |  |     |  |
| <b>3      Evaluate project</b>               | <table border="0"><tr><td style="vertical-align: top; padding-right: 20px;">3.1</td><td>Assess the effectiveness of the project at specified stages, using agreed evaluation methods.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">3.2</td><td>Take account of agreed goals and priorities when carrying out a project evaluation.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">3.3</td><td>Involve project team members, appropriate colleagues and customers in the project evaluation.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">3.4</td><td>Incorporate evaluation results into ongoing project management.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">3.5</td><td>Share information from project evaluation with appropriate colleagues and incorporate information into future planning.</td></tr></table>  | 3.1 | Assess the effectiveness of the project at specified stages, using agreed evaluation methods. | 3.2 | Take account of agreed goals and priorities when carrying out a project evaluation. | 3.3 | Involve project team members, appropriate colleagues and customers in the project evaluation.        | 3.4 | Incorporate evaluation results into ongoing project management.                                      | 3.5 | Share information from project evaluation with appropriate colleagues and incorporate information into future planning. |     |  |     |  |     |  |
| 3.1  | Assess the effectiveness of the project at specified stages, using agreed evaluation methods.  |     |   |     |   |     |  |     |  |     |   |     |  |     |  |     |  |
| 3.2  | Take account of agreed goals and priorities when carrying out a project evaluation.  |     |   |     |   |     |  |     |  |     |   |     |  |     |  |     |  |
| 3.3  | Involve project team members, appropriate colleagues and customers in the project evaluation.  |     |   |     |   |     |  |     |  |     |   |     |  |     |  |     |  |
| 3.4  | Incorporate evaluation results into ongoing project management.  |     |   |     |   |     |  |     |  |     |   |     |  |     |  |     |  |
| 3.5  | Share information from project evaluation with appropriate colleagues and incorporate information into future planning.  |     |   |     |   |     |  |     |  |     |   |     |  |     |  |     |  |

### **Range Statement**

This unit applies to all tourism and hospitality operations. The following explanations identify how this unit may be applied in different workplaces, sectors and circumstances.

For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs.

Projects may include:

- conferences and meetings
- promotional or other events
- introduction of new technology or systems
- product development

- research projects
- ongoing business projects.

Analysis of key factors to determine financial viability of the project may include:

- availability of short and long-term funding
- cashflow issues
- market feasibility
- level of financial risk involved
- cost benefit analysis
- impact on other aspects of operation
- breakeven points/profitability.

The administrative structure for the project may involve:

- management
- secretariat
- consultants
- contractors and suppliers
- Steering Committee
- advisory and reference groups
- consultative groups.

The project management plan may include:

- goals and outcomes
- selection or tendering process
- personnel
- budget
- stages
- timeframes
- key milestones
- internal and external communication processes and channels
- sponsors
- risk management and contingency plans
- quality assurance
- consultation strategies
- reporting requirements
- marketing.

Key project milestones may relate to stages, outcomes or reporting requirements.

Public relations and marketing strategies refers to those directly relevant to the project including:

- providing advice and information to clients, funding bodies and stakeholders
- developing and publishing reports
- developing and distributing brochures, fliers and other marketing materials
- communicating to public and stakeholders via mass media.

Project evaluation may be internal or external and may include:

- customer and stakeholder feedback
- client or funding body evaluation
- surveys and questionnaires
- pilots and trials
- long term monitoring strategies.

## Evidence Guide

### Essential Knowledge and Skills to be Assessed

The following skills and knowledge must be assessed as part of this unit:

- project management processes, the project life-cycle and the relationship between project stages
- in-depth knowledge of nature of the project being managed including internal and external issues to be considered
- planning and control procedures, resource management and risk management
- the need for and application of leadership and management skills within a project environment.

### Linkages to Other Units

This unit must be assessed with or after the following units:

- THHGLE03B Develop and implement operational plans
- THHGLE08B Lead and manage people
- THHGFA06A Interpret financial information
- THHGLE13B Manage finances within a budget
- THHGLE14B Prepare and monitor budgets

### Critical Aspects of Assessment

Evidence of the following is critical:

- ability to effectively plan, administer, monitor and evaluate a tourism/hospitality based project. This will include evidence of skills in planning, administration, financial management and leadership
- ability to apply understanding of the critical aspects of effective project management.

### Context of Assessment and Resource Implications

Assessment must ensure:

- management of a multi-faceted or complex industry-based project to be completed within a specified and realistic timeframe that reflects industry practice
- involvement of a project team for whom the candidate is a leader.

### Assessment Methods

Assessment methods must be chosen to ensure that managing a project can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- project to plan an event or function
- project to undertake a reform or re-development of a work aspect
- written or oral questions to assess underpinning knowledge related to project management
- review of portfolios of evidence relating to workplace experience eg. project plans, budgets, records of co-ordination and implementation of project phases and milestones, records of project reports.

## Key Competencies in this Unit



Key competencies are integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform    Level 2 = Administer and Manage    Level 3 = Design and Evaluate

<b>Key Competencies</b>	<b>Level</b>	<b>Examples</b>
Collecting, Organising and Analysing Information	3	Researching information related to the project Researching and comparing costs, products and services
Communicating Ideas and Information	3	Providing instructions and advice to participants and consultants Writing reports and related documents
Planning and Organising Activities	3	Planning the project and budgets, organising stakeholders and participants Establishing and allocating roles and responsibilities
Working with Others and in Teams	3	Working with other team members, stakeholders, consultants and government and funding bodies Providing leadership to consultants and others
Using Mathematical Ideas and Techniques	3	Costing out projects, developing budgets Keeping financial records of project income and expenditure
Solving Problems	3	Dealing with problems such as costs exceeding budgets, failure of people to meet timelines, poor quality outcomes, key people dropping out, illness of consultants, difficulties in enlisting participants in consultation, technical problems, computer viruses or crashes, difficult customers or colleagues
Using Technology	2	Using computer programs to manage projects eg. spreadsheets

## THHGLE16B

## Manage physical assets

### Unit Descriptor

This unit deals with the skills and knowledge required to manage the physical assets within a tourism or hospitality enterprise. It focuses on the skills needed by mainstream managers to pro-actively plan for and manage the acquisition and maintenance of physical assets. There is some overlap between this unit and unit THHGLE18B Monitor and maintain computer systems.

Element	Performance Criteria
<b>1      Develop strategies for systematic maintenance, repair and purchase of physical assets</b>	<ul style="list-style-type: none"><li>1.1      Develop strategies for managing physical assets that reflect overall enterprise business and marketing objectives.</li><li>1.2      Evaluate current and potential financial objectives and constraints in developing asset management strategies.</li><li>1.3      Integrate all occupational health and safety requirements into physical asset management.</li><li>1.4      Develop and maintain an accurate and current physical assets register as part of the asset management strategy.</li><li>1.5      Incorporate maintenance and repair regimes, which minimise disruption and loss of revenue and which involve appropriate specialists.</li><li>1.6      Integrate the need for environmental sustainability into physical asset management practices.</li></ul>
<b>2      Monitor the condition and performance of physical assets in the workplace</b>	<ul style="list-style-type: none"><li>2.1      Establish and implement systems to ensure that the condition and performance of physical assets are regularly reported and discussed within the enterprise.</li><li>2.2      Establish and implement systems to identify timely replacement of physical assets.</li><li>2.3      Make assessments of physical asset performance based on safety, operational efficiency and customer service quality.</li><li>2.4      Identify problems promptly and take appropriate action.</li><li>2.5      Identify the need for and access specialist assistance when required.</li></ul>

- |  |     |   |
|--|-----|---|
| <b>3      Co-ordinate financing of physical assets</b> | 3.1 | Prepare accurate work or equipment specifications to guide the acquisition process.   |
|  | 3.2 | Estimate acquisition costs based on evaluation of current, accurate and relevant data, including supplier quotations and estimates. |
|  | 3.3 | Make appropriate decisions on the acquisition of physical assets in accordance with enterprise policies and procedures.             |
|  | 3.4 | Select methods of financing to meet enterprise current financial objectives based on an analysis of internal and external           |
|  | 3.5 | Implement the financing process in consultation with key stakeholders and appropriate financial specialists.                        |
|  | 3.6 | Make and keep accurate records of all financial agreements and related documents.   |

### Range Statement

This unit applies to all tourism and hospitality sectors. The following explanations identify how this unit may be applied in different workplaces, sectors and circumstances.

For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs.

Physical assets management may be performed in whole or in part using external agencies and expertise.

Physical assets may include:

- buildings
- equipment
- fixtures, fittings and furnishings
- vehicles
- gardens
- pools
- rides and games.

Systems to monitor condition and performance of physical assets may include:

- integration of reporting into day-to-day operating procedures
- regular management reports
- inspections and audits (internal or external)
- regular staff feedback
- analysis of maintenance costs over a period of time.

Current, accurate and relevant data used for estimating costs may include:

- quotations from suppliers
- current maintenance contracts
- published or advertised prices
- previous contracts and costs.

## Evidence Guide

### Essential Knowledge and Skills to be Assessed

Knowledge of and skills in the following areas must be assessed as part of this unit:

- types of physical assets required within various tourism and hospitality enterprises
- maintenance requirements for different types of physical assets
- features and benefits of different financing options for asset acquisition including purchase, lease and hire purchase
- features of an assets register
- overview of taxation arrangements in relation to the acquisition and disposal of physical assets
- specific legislation relevant to the management and maintenance of physical assets (eg. in relation to vehicles, food production equipment)
- environmental standards and requirements in relation to different types of physical asset.

### Linkages to Other Units

This unit must be assessed with or after the following units. These units describe skills and knowledge that are essential to this unit of competence:

- THHGLE04B Establish and maintain a safe and secure workplace
- THHGLE15B Manage financial operations

There is also a link between this unit and the following unit and combined training and assessment may be appropriate:

- THHGLE18B monitor and maintain computer systems

Note: Knowledge of specific legal issues is required within this unit. This means that there is some duplication with the generic unit THHGLE20B Develop and update the legal knowledge required for business compliance. Repetition should be avoided in training and assessment.

### Critical Aspects of Assessment

Evidence of the following is critical:

- ability to plan for and manage the acquisition, maintenance and replacement of physical assets within a specific tourism and hospitality workplace
- understanding of the financial and legal issues that impact on the management of physical assets.

### Context of Assessment and Resource Implications

Assessment must ensure:

- project or work activities that allow the candidate to develop asset management strategies and financing arrangements for a specific business operation
- application of current financial data and regulations.

### Assessment Methods

Assessment methods must be chosen to ensure that asset management skills can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- case studies to develop asset acquisition and maintenance strategies for nominated business situations

- evaluation of projects conducted by the candidate in conjunction with industry to acquire assets or develop ongoing maintenance strategies
- oral or written questions to assess knowledge of financing options and relevant legislation
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

### Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform    Level 2 = Administer and Manage    Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	3	Assessing information to determine whether it is more economically viable to lease or purchase
Communicating Ideas and Information	3	Developing specifications that provide clear and concise information about enterprise needs
Planning and Organising Activities	3	Developing and monitoring systems and work procedures to ensure effective management of physical assets
Working with Others and in Teams	3	Liaising with the accountant to develop optimum approaches to the acquisition of physical assets
Using Mathematical Ideas and Techniques	2	Estimating costs and financial implications of asset acquisition
Solving Problems	3	Developing approaches to ongoing maintenance when all vehicles are required to meet peak season demands
Using Technology	2	Using spreadsheet technology to develop and assess different financial scenarios

**THHGLE17B****Manage and purchase stock****Unit Descriptor**

This unit deals with the skills and knowledge required to establish stock control and stock purchasing systems within a tourism or hospitality context. It focuses on the skills required by managers to establish and monitor high quality and cost-effective order and supply arrangements.

<b>Element</b>	<b>Performance Criteria</b>
<b>1      Establish and implement an order and supply process</b>	<div>1.1      Establish and implement an order and supply process.</div> <div>1.2      Establish economic order quantities based on internal information and supplier advice.</div> <div>1.3      Determine required stock levels according to peak seasons, special events and supplier's lead-time.</div> <div>1.4      Develop the process to include monitoring of quality during supply and delivery processes.</div>
<b>2      Establish and implement stock control systems</b>	<div>2.1      Develop stock control systems and communicate to all appropriate staff in a timely manner.</div> <div>2.2      Apply special control systems to items showing high wastage or loss.</div> <div>2.3      Use data correctly to calculate standard methods and measures and communicate to appropriate staff.</div> <div>2.4      Monitor systems in the workplace and make adjustments according to feedback and operational experience.</div> <div>2.5      Initiate training of staff to minimise stock wastage.</div>

- |   |     |  |
|---|-----|--|
| <b>3      Develop optimum supply arrangements</b> | 3.1 | Evaluate quality of supply based on feedback from colleagues and customers.                      |
|   | 3.2 | Source and review potential suppliers against enterprise requirements.                           |
|   | 3.3 | Develop appropriate and accurate purchase specifications.  |
|   | 3.4 | Assess suppliers against specifications considering all relevant factors.                        |
|   | 3.5 | Assess terms of purchase and negotiate with suppliers to achieve optimum supply arrangements.    |
|   | 3.6 | Adjust sources of supply in accordance with assessments and make accurate records of agreements. |

### Range Statement

This unit applies to all hospitality establishments. The following explanations identify how this unit may be applied in different workplaces, sectors and circumstances.

For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs.

Stock may include:

- food and beverage
- linen
- housekeeping supplies
- stationery
- cleaning agents and chemicals
- general stores
- merchandise.

Data for establishing stock control systems may include:

- yield tests
- historical sales figures
- stocktake figures.

Stock control systems may include:

- integrated point of sale systems
- imprest
- ledgers
- bin cards
- stocktaking systems
- stock valuation systems
- stock reporting systems.

Special control systems for items of high wastage may include:

- systems for receiving, storing and issuing

- requisitioning
- controlling issue quantities
- issuing to authorised persons
- procedures for stock transfer to other departments.

Standard methods and measures will vary depending on the product item, but may include:

- portion size (eg. weight, size, volume, count, scoop, measure, cup, slices)
- standard recipes.

Information to be included in a purchase specification may include:

- product name
- general description
- detailed description
- what product is to be used for
- storage procedures
- required labelling
- special instructions or requirements.

Relevant factors to consider in assessing suppliers against specifications may include:

- ability to meet all aspects of the specification
- product availability
- delivery service including emergency delivery
- minimum/maximum order quantities
- competitive pricing
- financial terms available
- references from other customers
- trading hours
- after sales service.

Terms of purchase may include:

- competitive or open market buying
- contract buying
- sealed bid buying
- cost plus buying
- one stop buying
- co-operative buying
- negotiated buying
- volume buying and warehousing
- centralised or decentralised purchasing.

## **Evidence Guide**

### **Essential Knowledge and Skills to be Assessed**

Knowledge of and skills in the following areas must be assessed as part of this unit:

- economic order quantities and their workplace application including:
  - applicability to different items
  - appropriate formulae
  - data required to compute the economic order quantity
  - information from suppliers needed to establish economic order quantities
- supply sources for different types of product
- information required to develop an accurate and complete purchase specification including appropriate terminology



- supplier and market knowledge relevant to the given industry context.

### **Linkages to Other Units**

This unit must be assessed with or after the following units. These units describe skills and knowledge that are essential to this unit of competence:

- THHGGA06B Receive and store stock or
- THHBKA03B Receive and store kitchen supplies
- THHGGA07B Control and order stock

For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs.

### **Critical Aspects of Assessment**

Evidence of the following is critical:

- ability to develop purchasing and control systems to ensure continuity, quality and cost-effectiveness of supply within a specific tourism or hospitality context
- knowledge of typical purchasing and control systems used within the relevant tourism or hospitality context.

### **Context of Assessment and Resource Implications**

Assessment must ensure:

- project or work activities that allow the candidate to develop purchasing and control systems to address a specific business operation.

### **Assessment Methods**

Assessment methods must be chosen to ensure that stock purchasing and management skills can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- evaluation of activities that allow the candidate to undertake a stock management role within a commercial kitchen or a food and beverage outlet over a period of time
- case studies to develop order and supply processes and stock control systems for different workplace situations
- oral or written questions to assess knowledge of typical systems for purchasing and stock control
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate

**Key Competencies in this Unit**

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform    Level 2 = Administer and Manage    Level 3 = Design and Evaluate

<b>Key Competencies</b>	<b>Level</b>	<b>Examples</b>
Collecting, Organising and Analysing Information	3	Analysing competitive supplier tenders
Communicating Ideas and Information	3	Developing clear and concise staff procedures for stock control
Planning and Organising Activities	3	Organising and monitoring procedures and systems
Working with Others and in Teams	3	Identifying training needs and initiating training in relation to effective stock control
Using Mathematical Ideas and Techniques	2	Calculating economic order quantities
Solving Problems	3	Developing solutions to a problem in quality of supply when there are limited suppliers in the marketplace
Using Technology	2	Using/manipulating computerised orders systems

**THHGLE18B****Monitor and maintain computer systems****Unit Descriptor**

This unit deals with the skills and knowledge required to monitor and maintain computer systems within the workplace. It does not apply to specialist computer staff, but focuses on the skills needed by team leaders, supervisors and managers to ensure computer equipment meets business needs.

**Element****Performance Criteria****1 Monitor effectiveness of computer equipment**

- 1.1 Monitor and evaluate the effectiveness of computer equipment to ensure it meets enterprise needs through ongoing consultation with users.
- 1.2 Monitor effectiveness through assessment of productivity and efficiency.
- 1.3 Identify performance problems through use of the operating system and relevant drives, disk structures, reports and files.
- 1.4 Establish and implement procedures for identifying and resolving problems including use of specialised assistance.
- 1.5 Identify computer training needs and provide training opportunities.

- |  |   |
|--|---|
| <b>2 Purchase hardware and software</b>          | <ul style="list-style-type: none"><li>2.1 Identify broad hardware and software requirements accurately and research possible new approaches using appropriate information sources.</li><li>2.2 Assess the feasibility of acquiring or upgrading based on available information.</li><li>2.3 Evaluate options against the needs of the enterprise including advantages and limitations.</li><li>2.4 Investigate user-friendliness, system support and training issues.</li><li>2.5 Seek external specialist assistance as required.</li><li>2.6 Make decisions on computer acquisitions in consultation with appropriate colleagues.</li><li>2.7 Plan introduction of new computer systems to take account of impacts on colleagues and customers.</li><li>2.8 Ensure staff are adequately trained in using new systems.</li><li>2.9 Monitor new systems for efficiency and take action accordingly.</li></ul> |
| <b>3 Maintain computer equipment and systems</b> | <ul style="list-style-type: none"><li>3.1 Establish and monitor systems for cleaning, minor maintenance and replacement of consumables in accordance with manufacturers' instructions.</li><li>3.2 Report faults to the nominated person or supplier for rectification.</li><li>3.3 Establish and monitor procedures for ensuring security of data, including regular back-ups and virus checks.</li><li>3.4 Create document filing systems and procedures to reflect the size, nature and complexity of the workplace.</li><li>3.5 Set up equipment to accept the software and functions being used.</li></ul>   |

### Range Statement

This unit applies to all tourism and hospitality sectors. The following explanations identify how this unit may be applied in different workplaces, sectors and circumstances.

For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs.

Computer equipment may include:

- screens
- hard drives
- printers
- scanners
- back-up systems.

Systems for minor maintenance, cleaning and replacement of consumables may relate to:

- creating more space on the hard disk
- reviewing programs
- deleting unwanted files
- cleaning dust from internal and external surfaces
- backing up files before major maintenance
- checking hard drive for errors
- defragmenting the hard disk
- using up to date anti-virus programs.

Information sources on new technology may include:

- computer magazines and journals
- trade fairs
- computer software designers
- computer hardware manufacturers
- retail outlets
- Internet
- industry associations
- seminars, workshops and training sessions
- internal/external clients.

Assessing the feasibility of new technology may include:

- establishing benefits and consequences
- assessing timeline for delivery and installation
- determining maintenance required
- assessing costs against available budget
- assessing technology against enterprise business plans and goals.

Software may include:

- word processing packages
- spreadsheet packages
- accounting packages
- database packages
- presentation packages
- Internet.

## **Evidence Guide**

### **Essential Knowledge and Skills to be Assessed**

Knowledge of and skills in the following areas must be assessed as part of this unit:

- sources of information and advice on computer systems relevant to the industry sector
- current technology options as appropriate to industry sector including both hardware and software and their general features and capabilities
- overview of typical systems for computer security, filing, back-up and virus control

- typical computer maintenance procedures conducted by operational staff as opposed to computer specialists
- key factors in achieving productivity and efficiency from computer systems including effective monitoring and reporting of faults and regular maintenance.

### **Linkages to Other Units**

There is a strong link between this unit and the following units:

- THHGLE01B Monitor workplace operations
- THHGLE16B Manage physical assets

Depending upon the industry sector and workplace combined training and assessment may be appropriate with the unit THHGLE16B Manage physical assets.

### **Critical Aspects of Assessment**

Evidence of the following is critical:

- current knowledge of the broad technological environment in which the enterprise operates and of the various options for computer technology in different industry sectors
- knowledge of and ability to use typical systems and procedures for the maintenance of computer systems.

### **Context of Assessment and Resource Implications**

Assessment must ensure:

- project or work activities conducted over a period of time to allow the candidate to monitor current technology and evaluate new technology for a specific business purpose
- access to a variety of computerised systems appropriate to the industry sector or enterprise.

### **Assessment Methods**

Assessment methods must be chosen to ensure that computer management skills can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- evaluation of projects undertaken by the candidate in conjunction with a specific workplace to review current computer technology and develop proposals for upgrading of equipment and software
- evaluation of activities and associated reports prepared by the candidate detailing the management and maintenance requirements for a given computer system and potential enhancements for the system
- evaluation of computerised filing systems, back-up or virus procedures established by the candidate
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

**Key Competencies in this Unit**

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform    Level 2 = Administer and Manage    Level 3 = Design and Evaluate

<b>Key Competencies</b>	<b>Level</b>	<b>Examples</b>
Collecting, Organising and Analysing Information	3	Reviewing and analysing promotional literature on different computer systems or software
Communicating Ideas and Information	2	Writing instructions for team members in relation to basic computer maintenance
Planning and Organising Activities	2	Organising work flow to facilitate the smooth introduction of a new computer system
Working with Others and in Teams	2	Identifying computer training needs and appropriate responses
Using Mathematical Ideas and Techniques	2	Calculating computer capacity Calculating and evaluating costs of purchasing new software or hardware
Solving Problems	2	Identifying new technology options to solve a current administrative problem
Using Technology	2	Developing and implementing technical procedures to ensure optimum computer performance

## **THHGLE19B                      Develop and implement a business plan**

### **Unit Descriptor**

This unit deals with the skills and knowledge required to develop and monitor a business plan, which incorporates a range of subsidiary plans or strategies. As such, this unit is holistic in nature and brings together skills and knowledge found in other units dealing with planning and operational management. This unit equates to the units BSBMGT601A Contribute to strategic direction and BSBMGT602A Contribute to the development of strategic plans, in the Business Services Training Package.

<b>Element</b>	<b>Performance Criteria</b>
<b>1      Analyse the internal and external business environment</b>	<div><div>1.1</div><div>Determine information requirements and undertake cost-effective research to deliver relevant information.</div></div> <div><div>1.2</div><div>Consult with all internal and external stakeholders in the research process.</div></div> <div><div>1.3</div><div>Use research to assist in the prediction of social, political, economic and technological developments.</div></div> <div><div>1.4</div><div>Identify and seek assistance and advice from appropriate experts when necessary.</div></div> <div><div>1.5</div><div>Review and analyse the existing internal resources and capabilities.</div></div> <div><div>1.6</div><div>Document and analyse business opportunities and obstacles based on valid and reliable market information.</div></div> <div><div>1.7</div><div>Review and analyse current and emerging trends and developments for their potential impact.</div></div> <div><div>1.8</div><div>Identify existing and potential competitors and allies and document their strengths and weaknesses.</div></div> <div><div>1.9</div><div>Explore the potential for joint ventures and strategic alliances.</div></div>



- |   |   |
|---|---|
| <b>2      Formulate business plans and strategies</b> | <p>2.1      Create or confirm enterprise mission, vision and purpose as the starting point for the business plan in consultation with stakeholders.</p> <p>2.2      Establish realistic, clearly stated and measurable objectives for the business.</p> <p>2.3      Develop appropriate strategies and tactics to address objectives across all areas of business operation.</p> <p>2.4      Identify and include opportunities for strategic business alliances.</p> <p>2.5      Develop all aspects of the business plan to ensure the business meets relevant legal, social, environmental and ethical obligations.</p> <p>2.6      Include appropriate action plans and evaluation processes, including key performance indicators.</p> <p>2.7      Consult with appropriate staff, management and other stakeholders to encourage support for the planning process so that all perspectives are taken into account in the development of the plan.</p> |
| <b>3      Implement the business plan</b>             | <p>3.1      Communicate the objectives and content of plans in a timely manner to facilitate a clear understanding of the plan and associated activities and individual responsibilities.</p> <p>3.2      Use appropriate communication and leadership techniques to encourage a team commitment to the business plan.</p> <p>3.3      Encourage staff to provide ongoing input into the business plan.</p> <p>3.4      Implement and organise actions detailed in the plan in a cost-efficient manner and in accordance with schedule and contingencies.</p>   |

<b>4      Monitor the business plan</b>	4.1	Review the business plan regularly and adjust in the light of changing circumstances.
	4.2	Monitor activities using the evaluation methods detailed in the plan and on an ongoing basis.
	4.3	Identify and analyse successes and performance gaps in terms of cause and effect.
	4.4	Implement agreed changes to plans promptly in the context of the following, ensuring timely communication of changes to all stakeholders.
	4.5	Report performance in a transparent manner to all stakeholders.

## Range Statement

This unit applies to all tourism and hospitality sectors. The following explanations identify how this unit may be applied in different workplaces, sectors and circumstances.

For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs.

The business plan is holistic in nature and may be for:

- a new small business venture
- an existing small business
- a division or department of a large organisation
- a new product development initiative.

Areas of business operation that must be included in the business plan are as follows:

- operations
- marketing
- technology
- human resources/labour requirements
- management and organisational structure
- financial plan and projections
- quality management.

Factors in the internal and external business environment to be analysed must include:

- capabilities and resources:
  - human resources
  - financial resources
  - equipment capacity
  - staff skill levels
  - hours of operation
  - communication capabilities
  - location/position.
- trends and developments in the marketplace:
  - economic
  - ecological/environmental
  - government activities
  - social and cultural
  - demographic

- technology
- industrial.
- comparative market information:
- best practice information
- benchmarking
- competitor information.
- legal and ethical constraints:
- legislation
- regulation
- codes of practice
- cultural expectations and influences
- social responsibilities (eg. protection of children, environmental issues).

Stakeholders may include:

- customers
- employees
- government agencies
- owners
- suppliers
- strategic alliance partners.

Evaluation processes may include:

- key performance indicators
- gap analysis
- customer feedback
- compliance reports
- employee feedback.

## **Evidence Guide**

### **Essential Knowledge and Skills to be Assessed**

Knowledge of and skills in the following areas must be assessed as part of this unit:

- detailed knowledge of business planning techniques and formats
- the legal, social, environmental and ethical obligations and compliance issues that affect the relevant industry context or enterprise
- detailed knowledge of the tourism and hospitality industry knowledge including current trends, structures and government policies
- research skills to identify and analyse the broad range of issues that impact on business operations.

### **Linkages to Other Units**

This unit must be assessed with or after the following units. These units describe skills and knowledge that are essential to this unit of competence:

- THHGLE03B Develop and implement operational plans
- THHGLE04B Establish and maintain a safe and secure workplace
- THHGLE08B Lead and manage people
- THHGLE11B Manage quality customer service
- THHGLE12B Develop and manage marketing strategies
- THHGLE13B Manage finances within a budget
- THHGLE14B Prepare and monitor budgets
- THHGLE15B Manage financial operations
- THHGLE16B Manage physical assets

- THHGLE20B Develop and update the legal knowledge required for business compliance
- THHGFA06A Interpret financial information

Assessment of this unit could easily incorporate assessment of other relevant leadership and management units. The planning and management of a commercial activity where the candidate is able to demonstrate skills across a broad range of areas is very strongly recommended.

Depending upon the industry sector and workplace combined delivery and assessment may be appropriate for some of these units.

Note: Knowledge of specific legal issues is required within this unit. This means that there is some duplication with the generic unit THHGLE20B Develop and update the legal knowledge required for business compliance. Repetition should be avoided in training and assessment.

### Critical Aspects of Assessment

Evidence of the following is critical:

- ability to undertake detailed, thorough and appropriate analyses of both internal and external business environments to provide a sound basis for business planning
- ability to develop and implement an integrated business plan which is implemented in a tourism or hospitality context.

### Context of Assessment and Resource Implications

Assessment must ensure:

- project or work activities conducted over a period of time to allow the candidate to develop **and** implement a business plan for a given product or service.
- involvement of a key stakeholder group including customers for the product or service
- access to a commercial environment in which the business plan can be implemented.

### Assessment Methods

Assessment methods must be chosen to ensure that business planning and implementation skills can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- evaluation of a business plan prepared by the candidate to guide the management of a commercial activity, plus evaluation of the resulting performance report also prepared by the candidate
- case studies to develop specific business plans and strategies for selected business activities or projects
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

### Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform    Level 2 = Administer and Manage    Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	3	Identifying and analysing competitive activity
Communicating Ideas and Information	3	Expressing complex strategies in a clear and concise format

Planning and Organising Activities	3	Co-ordinating stakeholder involvement in the planning process
Working with Others and in Teams	3	Devising strategies to ensure team commitment to business strategies
Using Mathematical Ideas and Techniques	2	Creating financial projections and forecasts
Solving Problems	3	Adjusting strategies to respond to severe and sudden budgetary constraints
Using Technology	2	Identifying and analysing the optimum use of technology to achieve business objectives

**THHGLE20B****Develop and update the legal knowledge required for business compliance****Unit Descriptor**

This unit deals with the skills and knowledge required to ensure business compliance with legislation governing the tourism and hospitality industries. It applies to senior personnel and managers. Knowledge of specific legal issues is covered within many other units; therefore there is some overlap with this unit. Repetition should be avoided in training and assessment.

**Element****Performance Criteria**

<b>1</b>	<b>Research the legal information required for business compliance</b>	1.1	Identify sources of legal information and advice correctly.
		1.2	Access, select and analyse information for relevance to the business.
		1.3	Record and distribute information appropriately.
<b>2</b>	<b>Ensure compliance with legal requirements</b>	2.1	Assess the need for legal advice and seek assistance where appropriate.
		2.2	Share information with appropriate work colleagues in a timely manner.
		2.3	Organise information updates and training for colleagues and staff where appropriate.
		2.4	Establish and monitor workplace systems and procedures to ensure compliance with legal requirements.
		2.5	Identify aspects of operations which may infringe laws and solicit advice on how to develop and implement modifications.
<b>3</b>	<b>Update legal knowledge</b>	3.1	Use informal and formal research to update the legal knowledge required for business compliance.
		3.2	Share updated knowledge with colleagues and incorporate into workplace planning and operations.

**Range Statement**

This unit applies to all tourism and hospitality sectors. The following explanations identify how this unit may be applied in different workplaces, sectors and circumstances.

The range and depth of legal information may vary but must include key areas specified in the Evidence Guide.

For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs.

Sources of legal information and informal/formal research may include:

- reference books
- media
- industry and/or employer associations
- industry journals
- Internet
- customers and suppliers
- legal experts.

Workplace systems and procedures to ensure compliance with legislation may relate to:

- recruitment, termination and other human resource management issues
- training practices
- approval processes and protocols for various work activities
- general work practices and work organisation approaches
- workplace design
- distribution of information within the enterprise
- signage.

Licensing refers to any licence required to operate a tourism or hospitality business, and may relate to:

- liquor
- gaming
- sale of travel products
- security
- trades
- access to protected areas.

## **Evidence Guide**

### **Essential Knowledge and Skills to be Assessed**

Knowledge of and skills in the following areas must be assessed as part of this unit:

- general knowledge of compliance provisions of legislation in following areas to the level of depth required by an operational manager or owner/operator and in the specific context of a tourism or hospitality enterprise:
  - legal responsibilities/liabilities of managers and directors within varying business structures
  - consumer protection and trade practices (key features of trade practices and fair trading legislation, its application in different States and Territories and the key areas in which tourism and hospitality businesses must ensure compliance)
  - licensing (licences needed by various businesses and individuals within those businesses, licence application procedures, ongoing requirements to maintain licence, auditing and inspection regimes, reasons for cancellation of licences)
  - contract (differences between contracts, the impacts of contract law on operators including the specific terms and obligations of contract, methods of contractual agreement, exclusion clauses and termination of contracts)
  - insurance (key business insurances required by different tourism and hospitality businesses including public liability and workers compensation)

- superannuation (employer responsibilities in relation to payment of superannuation for employees)
- industrial relations (rights and responsibilities of employees and employers under industrial relations legislation)
- taxation (overview of statutory reporting requirements for businesses)
- equal employment opportunity and anti-discrimination (key features, employer responsibilities and ramification of operating contrary to legislation)
- examples of specific legislation and local government regulations impacting on particular tourism or hospitality sectors or contexts (eg. Responsible Service of Alcohol, Responsible Conduct of Gaming, The Crimes (Child Sex Tourism) Amendment Act, European Economic Directive of Foreign Travel, Residential Tenancy Acts, Privacy Act and local government regulations on building, waste disposal)
- research skills in order to source and access legal information and advice
- sources of legal information and advice in particular industry sectors.

### **Linkages to Other Units**

This unit underpins effective performance in a range of other leadership and management units and combined training and/or assessment with those units would be appropriate.

Examples are:

- THHGLE10B Manage workplace relations
- THHGLE03B Develop and implement operational plans
- THHGLE19B Develop and implement a business plan
- THHGGA09B Manage projects

Note: Knowledge of specific legal issues is covered within many other units. This means that there is some duplication with this unit. Repetition should be avoided in training and assessment. Trainers and assessors must decide whether legal knowledge is covered in context with those other units or as part of this generic unit.

### **Critical Aspects of Assessment**

Evidence of the following is critical:

- general knowledge of the legislation that affects business operations in a particular industry sector as detailed under Essential Knowledge and Skills
- knowledge of how to access and update the legal information required for business compliance or seek professional assistance on legal matters.

### **Context of Assessment and Resource Implications**

Assessment must ensure:

- project or work activities that allow the candidate to demonstrate application of legal knowledge to specific tourism and hospitality workplace situations and problems.

For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs.

### **Assessment Methods**

Assessment methods must be chosen to ensure that the skills to develop and update relevant legal knowledge can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:



- evaluation of reports prepared by the candidate detailing how legal issues were identified and addressed in the conduct of a particular project
- evaluation of projects conducted by the candidate in conjunction with industry practitioners to address the compliance requirements for different workplaces
- case studies that allow the candidate to address the legal requirements for given situations
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

### Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform    Level 2 = Administer and Manage    Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	3	Reviewing documentation published by a government department to determine the requirements for a given enterprise
Communicating Ideas and Information	3	Developing a briefing document for supervisors, detailing the enterprise approach to various legal issues
Planning and Organising Activities	3	Conducting a review of business operations to analyse the ways in which the enterprise ensures it meets legal requirements
Working with Others and in Teams	2	Consulting with and providing appropriate training for colleagues in relation to legal requirements
Using Mathematical Ideas and Techniques	-	-
Solving Problems	3	Developing and implementing a system to correct a situation where the enterprise has failed to fully take account of a legal requirement
Using Technology	1	Accessing information from the Internet

## THHGLE22A                      Manage risk

### Unit Descriptor

This unit describes the skills and knowledge required to create, implement and monitor risk management strategies in a range of tourism and hospitality contexts. This role could be undertaken by different people depending upon the industry context (eg. tour guides, event managers, operations managers). This unit is very closely related to the unit THHGLE04B Establish and maintain a safe and secure workplace and care should be taken to avoid duplication in training and assessment. This unit equates to unit BSBMGT615A Manage risk in the Business Services Training Package.

Element	Performance Criteria
<b>1      Develop risk management strategies</b>	<div>1.1      Identify and document risks for a specific environment to include levels of probability and likely impacts.</div> <div>1.2      Integrate the perspective of all stakeholders when identifying risks.</div> <div>1.3      Develop and document contingency plans and procedures for risk elimination, minimisation and monitoring in consultation with colleagues and other stakeholders.</div> <div>1.4      Develop and document communication and reporting mechanisms in relation to identified risks including accountability and incident reporting.</div> <div>1.5      Establish mechanisms for the training and education of relevant colleagues and stakeholders.</div> <div>1.6      Establish procedures for ongoing identification of risks.</div>
<b>2      Implement risk management strategies</b>	<div>2.1      Monitor activities to identify potential risk on a continuous basis.</div> <div>2.2      Eliminate unacceptable risks wherever practicable in accordance with agreed strategies.</div> <div>2.3      Minimise risks that cannot be eliminated in accordance with agreed strategies.</div> <div>2.4      Monitor risks classified as low in accordance with agreed strategies.</div>

<b>3      Monitor risk management strategies</b>	3.1	Make evaluation of risk management a key component of all projects/activities.
	3.2	Analyse incidents that indicate a “near miss” and review strategies on each occasion.
	3.3	Feed information on risk management into the organisation’s overall health, safety and security planning processes at timely intervals.

## Range Statement

This unit applies to all tourism and hospitality enterprises. The following explanations identify how this unit may be applied in different workplaces, sectors and circumstances.

For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs.

Risks may include:

- health
- injury
- product failure
- damage to property or equipment
- industrial dispute
- professional incompetence
- natural disasters
- security failure
- system or equipment failure
- financial loss
- political events.

Specific environments may include any environment where workplace activities are undertaken including:

- offices
- kitchens
- bars and restaurants
- accommodation establishments
- event venues
- outdoor event venues
- natural environments
- grandstands
- mosh pits
- racecourses
- attractions and theme parks
- aquatic venues.

Stakeholders may include:

- customers
- colleagues
- suppliers/contractors
- athletes
- performers
- participants

- audience.

A “near miss” refers to an event or incident which in other circumstances may have resulted in an injury to a person, damage to property or some other negative impact on the organisation or community.

## **Evidence Guide**

### **Essential Knowledge and Skills to be Assessed**

Knowledge of and skills in the following areas must be assessed as part of this unit:

- types of risks that apply within a given industry sector or context
- legal requirements to be considered within a risk management context
- OH&S and environmental requirements in a given workplace
- relevant industrial awards and agreement that impact on risk management
- overall emergency plans that apply to a specific industry context or enterprise
- strategic, tactical and operational plans and their impact on risk management in a given context.

### **Linkages to Other Units**

This unit has strong linkage to many other units and combined assessment and/or training is recommended. Examples include:

- All event management units
- THHGE21B Develop and maintain the legal knowledge required for business compliance
- THHGLE04B Establish and maintain a safe and secure workplace
- THTFTG04B Co-ordinate and operate a tour

### **Critical Aspects of Assessment**

Evidence of the following is critical:

- ability to demonstrate a systematic approach to the identification of risks and the development of strategies to address those risks
- knowledge of the types of risks of particular relevance to a given industry sector.

### **Context of Assessment and Resource Implications**

Assessment must ensure:

- development of risk management strategies for a nominated workplace, activity or project and implementation within the relevant fully operational commercial environment (eg. at an event location, on tour)
- application of current industry guidelines, codes of practice and legislation in relation to risk management
- involvement of colleagues and stakeholders in the consultation and education process.

### **Assessment Methods**

Assessment methods must be chosen to ensure that ability to manage risk can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- evaluation of risk management strategies and procedures prepared by the candidate for a given workplace
- evaluation of the implementation process through interviews with key stakeholders or review of reports

- case studies and problem solving to assess application of knowledge to specific operations and situations
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

### Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform    Level 2 = Administer and Manage    Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	3	Gathering information to conduct a risk management audit
Communicating Ideas and Information	3	Educating colleagues about the importance of risk management
Planning and Organising Activities	3	Developing systems and procedures to eliminate or minimise risk
Working with Others and in Teams	3	Consulting with colleagues on the effectiveness of strategies
Using Mathematical Ideas and Techniques	2	Calculating the probability of risks
Solving Problems	3	Adjusting a long-established operational procedure to minimise risk
Using Technology	2	Distributing regular risk management updates across the organisation

## THHGLE05B

## Roster staff

### Unit Descriptor

This unit deals with the skills and knowledge required to develop staff rosters. Depending upon the sector and enterprise, this role may be carried out by dedicated specialist staff or by operational supervisors and managers.

Element	Performance Criteria
<b>1 Develop and implement staff rosters</b>	<p>1.1 Develop rosters in accordance with relevant award provisions, enterprise agreements and wage budgets.</p> <p>1.2 Maximise operational efficiency and customer service levels while minimising wage costs in roster development.</p> <p>1.3 Combine duties where appropriate to ensure effective use of staff.</p> <p>1.4 Utilise the available skills base appropriately to roster the most effective mix of staff and to meet different operational requirements.</p> <p>1.5 Present rosters in required formats to ensure clarity of information in accordance with enterprise standards.</p> <p>1.6 Communicate rosters to appropriate colleagues within designated timelines.</p>
<b>2 Maintain staff records</b>	<p>2.1 Complete time sheets and other documentation accurately and within designated timelines.</p> <p>2.2 Update staff records accurately and maintain or store in accordance with enterprise procedures.</p>

### Range Statement

This unit applies to all tourism and hospitality sectors. The following explanations identify how this unit may be applied in different workplaces, sectors and circumstances.

For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs.

Rostering may be for:

- an individual department
- a whole enterprise
- a specific project.

Award provisions and enterprise agreements may affect rostering in relation to a range of issues including:

- number of hours worked in a given shift
- overall number of hours allocated to different staff members
- breaks between shifts
- nature of duties allocated
- use of permanent or casual staff.

## **Evidence Guide**

### **Essential Knowledge and Skills to be Assessed**

Knowledge of and skills in the following areas must be assessed as part of this unit:

- the role of rosters and their importance in controlling staff costs
- factors to be considered when developing rosters
- formats for the presentation of staff rosters and details to be included
- overview of software programs available for roster design
- in-depth knowledge of area of operation for which roster is being developed.

### **Linkages to Other Units**

There is a strong link between this unit and a range of other units that may be carried out by supervisors and managers in the workplace. Depending upon the industry sector and workplace, combined assessment/training may be appropriate. Examples include:

- THHGLE01B Monitor work operations
- THHGLE03B Develop and implement operational plans
- THHGLE06B Monitor staff performance

Note: Knowledge of specific legal issues is required within this unit. This means that there is some duplication with the generic unit THHGLE20B Develop and update the legal knowledge required for business compliance. Repetition should be avoided in training and assessment.

### **Critical Aspects of Assessment**

Evidence of the following is critical:

- knowledge and understanding of the factors and issues which impact upon staff rostering
- familiarity with typical formats for rosters and the key information to be included
- ability to prepare staff rosters which meet wages budgets and which provide a level of staffing sufficient to ensure the delivery of high quality customer service.

### **Context of Assessment and Resource Implications**

Assessment must ensure:

- project or work activities which allow the candidate to prepare rosters for a workplace and to evaluate their cost efficiency and operational effectiveness against nominated standards
- preparation of more than one roster to meet the staffing requirements of more than one operational situation.

For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs.

## Assessment Methods

Assessment methods must be chosen to ensure that rostering skills and knowledge can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- evaluation of the staffing costs and service levels at an event for which the candidate has prepared rosters
- case studies to develop rosters for typical industry working periods and for different operational situations
- oral or written questions to assess knowledge of specific factors which affect the design of rosters
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

## Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform    Level 2 = Administer and Manage    Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	2	Reviewing award information for rostering implications
Communicating Ideas and Information	2	Preparing and distributing a roster document for circulation to colleagues
Planning and Organising Activities	2	Gathering information and developing a roster for an operational period which includes several days of unusually high customer demand
Working with Others and in Teams	1	Consulting with colleagues in relation to individual rostering requests
Using Mathematical Ideas and Techniques	2	Calculating staff costs for a given roster and comparing with wages budgets
Solving Problems	2	Developing a roster for a period where the wages budget has just been cut by 10%
Using Technology	1	Using rostering software



**THHGLE06B****Monitor staff performance****Unit Descriptor**

This unit deals with the skills and knowledge required to monitor staff performance, within the framework of established performance management systems. It includes the skills to conduct structured performance appraisal and formal counselling sessions. A more strategic approach to performance management can be found in unit BSBHR601A Manage performance management systems from the Business Services Training Package.

<b>Element</b>	<b>Performance Criteria</b>
<b>1 Monitor performance and provide feedback to staff</b>	<ul style="list-style-type: none"><li>1.1 Consult with and inform colleagues about expected standards of performance using appropriate communication mechanisms.</li><li>1.2 Monitor ongoing performance by maintaining close contact with the workplace and relevant colleagues.</li><li>1.3 Provide confirming and corrective feedback to colleagues on an on-going basis.</li><li>1.4 Provide colleagues with appropriate guidance and support in the workplace.</li><li>1.5 Recognise and reward achievements and outstanding performance in accordance with enterprise procedures.</li><li>1.6 Identify the need for further coaching or training and organise in accordance with enterprise policies.</li></ul>
<b>2 Recognise and resolve performance problems</b>	<ul style="list-style-type: none"><li>2.1 Identify and investigate performance problems promptly.</li><li>2.2 Use feedback and coaching appropriately to address performance problems.</li><li>2.3 Discuss and agree upon possible solutions with the colleague in question in accordance with enterprise procedures.</li><li>2.4 Follow up outcomes of informal counselling through review in the workplace.</li><li>2.5 Organise and conduct a formal counselling session when required in accordance with required procedures.</li></ul>

- |   |  |     |   |     |  |     |  |     |  |
|---|--|-----|---|-----|--|-----|--|-----|--|
| <b>3 Implement performance management systems</b> | <table border="0"><tr><td style="padding-right: 20px;">3.1</td><td>Implement formal performance management systems in accordance with enterprise policy.</td></tr><tr><td>3.2</td><td>Conduct individual performance evaluations openly and fairly in accordance with enterprise policy.</td></tr><tr><td>3.3</td><td>Complete and file performance management records in accordance with enterprise policy and industrial requirements.</td></tr><tr><td>3.4</td><td>Agree on courses of action with colleagues and follow up in the workplace.</td></tr></table> | 3.1 | Implement formal performance management systems in accordance with enterprise policy. | 3.2 | Conduct individual performance evaluations openly and fairly in accordance with enterprise policy. | 3.3 | Complete and file performance management records in accordance with enterprise policy and industrial requirements. | 3.4 | Agree on courses of action with colleagues and follow up in the workplace. |
| 3.1   | Implement formal performance management systems in accordance with enterprise policy.  |     |   |     |  |     |  |     |  |
| 3.2   | Conduct individual performance evaluations openly and fairly in accordance with enterprise policy.   |     |   |     |  |     |  |     |  |
| 3.3   | Complete and file performance management records in accordance with enterprise policy and industrial requirements.   |     |   |     |  |     |  |     |  |
| 3.4   | Agree on courses of action with colleagues and follow up in the workplace.   |     |   |     |  |     |  |     |  |

### Range Statement

This unit applies to all tourism and hospitality sectors. The following explanations identify how this unit may be applied in different workplaces, sectors and circumstances.

For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs.

Expected standards of performance and performance problems may relate to:

- productivity
- punctuality
- personal presentation
- level of accuracy in work
- adherence to procedures
- customer service standards
- team interaction
- response times
- waste minimisation
- cost minimisation.

Recognition of achievement may include:

- informal acknowledgment
- acknowledgment of an individual's good performance to the whole team
- presentation of awards
- written report to management.

Solutions to performance problems may include:

- additional training
- assistance with problems outside of the workplace
- adjustment of workload
- re-organisation of work practices
- agreement on short-term goals for improvement.

Issues to be considered in performance evaluations may include:

- type of assessment (eg. self, peer, team, productivity indicators)
- methods of collecting performance data
- methods of interpreting performance data
- processes for performance appraisal interviews.

Required procedures for a formal counselling session may include:

- formal notification to staff member and/or management
- invitation of appropriate people
- organisation of appropriate location for counselling session.

## **Evidence Guide**

### **Essential Knowledge and Skills to be Assessed**

Knowledge of and skills in the following areas must be assessed as part of this unit:

- understanding of the performance management concept within an organisation
- types of performance standards and performance management systems applicable to tourism and hospitality workplaces
- the role and importance of feedback and coaching, including appropriate communication, in relation to monitoring staff performance
- grievance procedures
- knowledge of performance appraisal techniques and systems including:
  - reasons for performance appraisal
  - types of performance assessment
  - compiling and using performance data
  - protocols and procedures for performance appraisal interviews
  - procedures for formal counselling sessions
- communication skills including active listening, questioning and using appropriate non-verbal communication in specific relation to counselling, providing feedback and coaching
- knowledge of industrial relations, Equal Employment Opportunity and diversity issues which impact on monitoring staff performance.

### **Linkages to Other Units**

This unit must be assessed with or after the following units. These units describe skills and knowledge that are essential to this unit of competence:

- THHGTR01B Coach others in job skills

There is also a strong link between this unit and a range of other units carried out by supervisors and managers in the workplace. Depending upon the industry sector and workplace, combined training and assessment may be appropriate. Examples include:

- THHGLE01B Monitor work operations
- THHGLE03B Develop and implement operational plans
- THHGLE08B Lead and manage people

Note: Knowledge of specific legal issues is required within this unit. This means that there is some duplication with the generic unit THHGLE20B Develop and update the legal knowledge required for business compliance. Repetition should be avoided in training and assessment.

### **Critical Aspects of Assessment**

Evidence of the following is critical:

- knowledge of typical procedures and processes for formal performance management and counselling
- ability to demonstrate appropriate communication skills to provide supportive feedback and guidance to colleagues.

## Context of Assessment and Resource Implications

Assessment must ensure:

- project or work activities that allow the candidate to address typical performance management issues found in tourism or hospitality workplaces
- interaction with others to demonstrate appropriate communication skills.

For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs.

## Assessment Methods

Assessment methods must be chosen to ensure that performance management skills can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- evaluation of reports prepared by the candidate detailing how performance management issues may have been addressed during the conduct of a team project
- evaluation of projects conducted by the candidate in conjunction with industry practitioners to develop performance management approaches for different workplaces
- role-play to provide feedback, conduct a performance appraisal or formal counselling session
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

## Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform    Level 2 = Administer and Manage    Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	3	Gathering and analysing sales results achieved by staff members
Communicating Ideas and Information	3	Running a consultation session on a new performance appraisal system Conducting an informal counseling session
Planning and Organising Activities	2	Co-ordinating a series of 6-monthly performance appraisal interviews, including scheduling and preparation of all documents
Working with Others and in Teams	3	Providing constructive feedback to a colleague who is struggling to meet sales targets
Using Mathematical Ideas and Techniques	-	-
Solving Problems	3	Developing and following through on a solution with a team member who is consistently providing difficulties for other team members
Using Technology	1	Using human resource management software for the performance appraisal process

**THHGLE07B****Recruit and select staff****Unit Descriptor**

This unit deals with the skills and knowledge required to recruit and select staff within the framework of existing human or staffing resource plans or policies. Depending upon the sector and enterprise, dedicated specialist staff, operational supervisors or managers may undertake this role. A more strategic approach to recruitment and selection can be found in unit BSBHR605A Manage recruitment and selection processes from the Business Services Training Package.

<b>Element</b>		<b>Performance Criteria</b>	
<b>1</b>	<b>Identify recruitment needs</b>	1.1	Identify short-term recruitment needs based on monitoring of service and efficiency levels in the workplace.
		1.2	Consult appropriate colleagues and other stakeholders in relation to staffing needs and job specifications.
		1.3	Develop clear and concise selection criteria and job specifications.
		1.4	Use job descriptions where appropriate to facilitate the recruitment process.
		1.5	Obtain approval for recruitment initiatives in accordance with enterprise policy.
<b>2</b>	<b>Administer recruitment</b>	2.1	Create, approve and disseminate advertisements for positions in accordance with enterprise policy and legal requirements.
		2.2	Process applications in accordance with enterprise policy.
		2.3	Inform applicants of decisions and provide other recruitment information within reasonable timeframes.
		2.4	Organise interviews and other selection processes in accordance with enterprise policy.
		2.5	Make employment offers in accordance with enterprise policy.
		2.6	Advise prospective employees on details in accordance with enterprise policy and industrial/legislative requirements.
		2.7	Process and file in accordance with enterprise policy.
		2.8	Identify and communicate recommendations for improvements in recruitment processes to appropriate colleagues promptly.

- |   |  |
|---|--|
| <b>3 Select staff</b>                         | <div style="margin-left: 20px;"><div>3.1 Review applications against criteria, noting any additional influencing factors.</div><div>3.2 Conduct interviews and other selection procedures in accordance with enterprise policy and legal requirements.</div><div>3.3 Use selection criteria as the basis for selection.</div><div>3.4 Communicate selection recommendations to appropriate colleagues.</div><div>3.5 Create and maintain accurate, clear and complete records of the selection process.</div></div>  |
| <b>4 Plan and organise induction programs</b> | <div style="margin-left: 20px;"><div>4.1 Plan the content and format of induction programs to reflect enterprise objectives and policies.</div><div>4.2 Include all appropriate practical information in induction programs in accordance with enterprise policy and industrial/legislative requirements.</div><div>4.3 Include information on the culture of the enterprise in induction programs.</div><div>4.4 Liaise with operational colleagues to ensure induction programs are implemented in a manner that minimises operational disruption.</div></div> |

## Range Statement

This unit applies to all tourism and hospitality sectors. The following explanations identify how this unit may be applied in different workplaces, sectors and circumstances.

For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs.

Enterprise policies in relation to recruitment may relate to:

- approval processes for additional recruitment
- approval processes advertised salaries
- required profile of potential employees (eg. trainees, fully skilled)
- use of government-subsidised traineeships
- nature and content of job advertisements
- nature and content of communications with applicants
- use of different media in the recruitment process
- participants in interview panels
- timing and nature of induction programs
- role of different personnel within the recruitment and induction process.

Recruitment needs may be:

- permanent

- temporary
- full-time
- part-time
- casual
- volunteer
- project-related (eg. for an event).

Advertising for personnel may be:

- internal
- external
- direct to the public
- via a recruitment agency
- on the Internet.

## **Evidence Guide**

### **Essential Knowledge and Skills to be Assessed**

Knowledge of and skills in the following areas must be assessed as part of this unit:

- broad knowledge of personnel planning, selection and recruitment practices
- the role of job descriptions and typical formats
- the role and uses of competency standards for the recruitment process
- recruitment methods and processes used within the tourism and hospitality industry including most appropriate styles of advertising, features of an effective recruitment advertisement, roles of recruitment agencies and internal recruitment
- protocols and procedures for conducting selection interviews including make-up of interview panels, type of questions and equity issues
- procedures and methods for selection and testing
- procedures for reference checks
- nature and role of induction programs and typical content
- details of relevant legislation in relation to recruitment and selection of staff including Equal Employment Opportunity, anti-discrimination and dismissal procedures
- overview of potential requirements for employing people with special needs
- award provisions or other enterprise agreement issues which impact on the recruitment process.

### **Linkages to Other Units**

There is a strong link between this unit and a range of other units that deal with employee relations issues. Depending upon the sector and individual workplace, combined delivery may be appropriate.

Note: Knowledge of specific legal issues is required within this unit. This means that there is some duplication with the generic unit THHGLE20B Develop and update the legal knowledge required for business compliance. Repetition should be avoided in training and assessment.

### **Critical Aspects of Assessment**

Evidence of the following is critical:

- knowledge and understanding of recruitment processes and procedures used within the tourism and hospitality industry
- ability to administer the total recruitment process
- ability to develop job specifications and selection criteria for recruitment, conduct fair interviews and make selections based on agreed criteria.

## Context of Assessment and Resource Implications

Assessment must ensure:

- conduct of a complete recruitment process involving multiple applicants to meet a specific industry need
- conduct of interviews with multiple applicants as part of the recruitment process.

For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs.

## Assessment Methods

Assessment methods must be chosen to ensure that recruitment and selection skills can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- direct observation of the candidate conducting a number of job interviews
- review of documentation prepared by the candidate detailing job specifications, advertisements and supporting correspondence to support the recruitment process
- evaluation of projects conducted by the candidate in conjunction with industry practitioners to develop job specifications and recruitment procedures for different workplaces
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

## Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform    Level 2 = Administer and Manage    Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	3	Evaluating and culling applications
Communicating Ideas and Information	3	Developing clear and concise job descriptions
Planning and Organising Activities	2	Administering the recruitment process including responding to applicants and organising interviews
Working with Others and in Teams	3	Participating in an interview panel and discussing selection recommendations
Using Mathematical Ideas and Techniques	1	Calculating staff numbers
Solving Problems	2	Responding to a situation where response levels to a job advertisement are very poor
Using Technology	1	Using software to produce attractive staff induction kits



**THHGLE08B****Lead and manage people****Unit Descriptor**

This unit deals with the skills and knowledge required by managers, supervisors and team leaders to lead and manage teams of people in the workplace, including volunteers where appropriate. The unit focuses on leadership, motivation and teamwork.

<b>Element</b>	<b>Performance Criteria</b>
<b>1      Model high standards of performance and behaviour</b>	1.1      Make individual performance a positive role model for others.
	1.2      Show support for and commitment to enterprise goals in day-to-day work performance.
	1.3      Treat people with integrity, respect and empathy.
<b>2      Develop team commitment and co-operation</b>	2.1      Develop and clearly communicate plans and objectives in consultation with the team.
	2.2      Make plans and objectives consistent with enterprise goals.
	2.3      Communicate expectations, roles and responsibilities in a way that encourages individuals/teams to take responsibility for their work.
	2.4      Encourage teams and individuals to develop innovative approaches to work.
	2.5      Identify, encourage, value and reward individual and team efforts and contributions.
	2.6      Model and encourage open and supportive communication styles within the team.
	2.7      Seek and share information from the wider environment with the team.
	2.8      Represent the team's interests appropriately in the wider environment.
<b>3      Manage team performance</b>	3.1      Assess the skills of team members and provide opportunities for individual development.
	3.2      Monitor team performance to ensure progress towards achievement of goals.
	3.3      Delegate tasks and responsibilities appropriately.
	3.4      Provide mentoring and coaching support to team members.
	3.5      Recognise and reward team achievements.

## Range Statement

This unit applies to all tourism and hospitality sectors. The following explanations identify how this unit may be applied in different workplaces, sectors and circumstances.

For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs.

Teams may be:

- project-based
- permanent teams
- paid workers
- volunteers.

Plans and objectives may be short, medium or long-term and relate to:

- sales targets
- performance targets for a particular project
- increased productivity
- meeting Key Performance Indicators.

Recognition and reward of team members may include:

- informal acknowledgment
- acknowledgment of an individual's good performance to the whole team
- presentation of awards
- written report to management
- incentive initiatives for volunteers.

Information from the wider environment, which may affect the team, may include:

- overall enterprise objectives
- rationale for management decisions
- changes in enterprise policies
- marketing information and targets
- business performance information (including financial)
- technology updates
- plans for new equipment
- training developments.

Opportunities for individual development may include:

- internal training/professional development
- external training/professional development
- change in job responsibilities
- opportunity for greater autonomy or responsibility
- formal promotion.

## Evidence Guide

### Essential Knowledge and Skills to be Assessed

Knowledge of and skills in the following areas must be assessed as part of this unit:

- different leadership styles and the characteristics of effective leadership
- principles of teamwork including characteristics of effective teams, organisation of teams, potential team problems and the benefits of effective teamwork

- the role and theories of motivation and its application to different workplace contexts
- workplace conflict, typical causes (including cultural differences) and impact on the role of leaders
- organisational structure and group dynamics
- legislative issues that impact on team management including Equal Employment Opportunity, diversity, anti-discrimination and unfair dismissal.

**Linkages to Other Units:**

This unit must be assessed with or after the following units. These units describe skills and knowledge that are essential to this unit of competence:

- THHGCS03B Deal with conflict situations
- THHGLE01B Monitor work operations

Depending upon the industry sector and workplace, combined training may also be appropriate with these and other related leadership units.

Note: Knowledge of specific legal issues is required within this unit. This means that there is some duplication with the generic unit THHGLE20B Develop and update the legal knowledge required for business compliance. Repetition should be avoided in training and assessment.

**Critical Aspects of Assessment**

Evidence of the following is critical:

- knowledge of leadership, motivation and teamwork principles
- ability to build positive team spirit and effectively manage overall team performance within a specific tourism and hospitality context.

**Context of Assessment and Resource Implications**

Assessment must ensure:

- project or work activities conducted over a period of time to allow the candidate to play an ongoing team-leading role
- involvement of a team whose overall performance is the responsibility of the candidate.

For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs.

**Assessment Methods**

Assessment methods must be chosen to ensure that team-building and team-leading skills can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- evaluation of team leadership within a project or activity managed by the candidate
- evaluation of reports prepared by the candidate detailing how team commitment was encouraged and how team performance was managed during the conduct of a project
- case studies to develop approaches to specific team leadership situations
- oral or written questions to assess theoretical knowledge of leadership, motivation and teamwork
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

**Key Competencies in this Unit**

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform    Level 2 = Administer and Manage    Level 3 = Design and Evaluate

<b>Key Competencies</b>	<b>Level</b>	<b>Examples</b>
Collecting, Organising and Analysing Information	3	Analysing sales figures to assess team performance
Communicating Ideas and Information	3	Explaining and discussing the rationale for a management decision that affects the team
Planning and Organising Activities	2	Organising and administering regular team meetings
Working with Others and in Teams	3	Providing guidance to the team on handling change in the workplace
Using Mathematical Ideas and Techniques	1	Calculating sales targets
Solving Problems	3	Resolving conflict within the team
Using Technology	1	Using email or other technology to ensure regular communication with the team

## THHGLE09B

## Manage workplace diversity

### Unit Descriptor

This unit deals with the skills and knowledge required to provide leadership in a diverse workplace where customers and staff are from a wide range of backgrounds. It builds on the common core unit THHCOR02B Work in a socially diverse environment, and reflects the importance of managing diversity in the tourism and hospitality industry.

Element	Performance Criteria						
<b>1      Encourage respect for diversity in the workplace</b>	<table><tr><td>1.1</td><td>Provide a role model for others through individual behaviour that demonstrates respect for diversity.</td></tr><tr><td>1.2</td><td>Develop work practices and undertake planning in a manner which shows respect for workplace diversity.</td></tr><tr><td>1.3</td><td>Assist and coach colleagues in ways of accepting diversity in relation to both colleagues and customers.</td></tr></table>	1.1	Provide a role model for others through individual behaviour that demonstrates respect for diversity.	1.2	Develop work practices and undertake planning in a manner which shows respect for workplace diversity.	1.3	Assist and coach colleagues in ways of accepting diversity in relation to both colleagues and customers.
1.1	Provide a role model for others through individual behaviour that demonstrates respect for diversity.						
1.2	Develop work practices and undertake planning in a manner which shows respect for workplace diversity.						
1.3	Assist and coach colleagues in ways of accepting diversity in relation to both colleagues and customers.						
<b>2      Use diversity as an asset</b>	<table><tr><td>2.1</td><td>Recognise the skills of a diverse workforce and use to enhance enterprise performance.</td></tr><tr><td>2.2</td><td>Promote the benefits of productive diversity to colleagues.</td></tr></table>	2.1	Recognise the skills of a diverse workforce and use to enhance enterprise performance.	2.2	Promote the benefits of productive diversity to colleagues.		
2.1	Recognise the skills of a diverse workforce and use to enhance enterprise performance.						
2.2	Promote the benefits of productive diversity to colleagues.						
<b>3      Deal with problems arising from diversity issues</b>	<table><tr><td>3.1</td><td>Recognise workplace problems that arise from diversity issues promptly and take action to resolve the situation.</td></tr><tr><td>3.2</td><td>Identify training needs take appropriate action.</td></tr><tr><td>3.3</td><td>Use coaching and mentoring to assist colleagues to successfully work in a diverse environment.</td></tr></table>	3.1	Recognise workplace problems that arise from diversity issues promptly and take action to resolve the situation.	3.2	Identify training needs take appropriate action.	3.3	Use coaching and mentoring to assist colleagues to successfully work in a diverse environment.
3.1	Recognise workplace problems that arise from diversity issues promptly and take action to resolve the situation.						
3.2	Identify training needs take appropriate action.						
3.3	Use coaching and mentoring to assist colleagues to successfully work in a diverse environment.						

### Range Statement

This unit applies to all tourism and hospitality sectors. The following explanations identify how this unit may be applied in different workplaces, sectors and circumstances.

For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs.

Diversity refers to diversity in its broadest sense and may be related to:

- race
- language
- special needs

- disabilities
  - family structure
  - gender
  - age
  - sexual preference.
- 
- Planning and work practices that reflect respect for diversity may include:
  - acknowledgment of religious and cultural celebrations
  - appropriate allocation of duties to particular staff members
  - culturally appropriate mixing of staff
  - training in culturally-appropriate communication
  - consideration of customers with special needs.

Benefits of productive diversity may include:

- a multi-lingual workforce
- workforce that reflects the diversity of the customer base
- improved cross-cultural communication
- education of the workforce
- removal of prejudice
- different perspectives on problem solving
- increase trade with other countries/cultures
- more interesting work environments.

## **Evidence Guide**

### **Essential Knowledge and Skills to be Assessed**

Knowledge of and skills in the following areas must be assessed as part of this unit:

- specific diversity issues which apply to the tourism and hospitality industry and which contribute to the industry's progress including benefits of productive diversity
- cross-cultural communication skills with specific reference to the roles of leaders and managers including cross-cultural communication for:
  - conflict resolution
  - problem-solving
  - negotiation
  - motivation.
- legal issues that relate to diversity including Equal Employment Opportunity and anti-discrimination.

### **Linkages to Other Units**

This unit must be assessed with or after the following units. These units describe skills and knowledge that are essential to this unit of competence:

- THHCOR02B Work in a socially diverse environment
- THHGCS03B Deal with conflict situations
- THHGLE01B Monitor work operations

Depending upon the industry sector and workplace combined delivery/assessment may also be appropriate with a range of other units. Examples include:

- THHGLE08B Lead and manage people
- THHGLE07B Recruit and select staff

Note: Knowledge of specific legal issues is required within this unit. This means that there is some duplication with the generic unit THHGLE20B Develop and update the legal knowledge required for business compliance. Repetition should be avoided in training and assessment.

### Critical Aspects of Assessment

Evidence of the following is critical:

- understanding of the role of leaders and managers in encouraging diversity in the tourism and hospitality industry
- knowledge of cross-cultural communication techniques as they apply to leaders and managers
- knowledge of specific cultural issues that may apply in a particular industry context.

### Context of Assessment and Resource Implications

Assessment must ensure:

- project or work activities that allow the candidate to address typical diversity issues found in tourism or hospitality workplaces.

For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs.

### Assessment Methods

Assessment methods must be chosen to ensure that the skills to manage diversity can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- case studies to develop strategies for effectively managing diversity in different industry contexts
- oral or written questions to assess knowledge of cross-cultural issues and communication techniques
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

### Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform    Level 2 = Administer and Manage    Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	3	Researching and analysing information on another culture to assist in an upcoming commercial negotiation
Communicating Ideas and Information	3	Making a presentation on the benefits of a diverse workforce
Planning and Organising Activities	2	Organising work allocations to meet different cultural needs
Working with Others and in Teams	3	Building positive team-spirit with a team of individuals from highly varied social and cultural backgrounds

Using Mathematical Ideas and Techniques	1	Calculating whether the diversity of the workforce reflects overall diversity in the community
Solving Problems	3	Dealing with a cross-cultural conflict within the team
Using Technology	1	Using the Internet to research diversity issues



**THHGLE10B****Manage workplace relations****Unit Descriptor**

This unit deals with the skills and knowledge required to manage workplace relations from an industrial relations perspective. It focuses on the skills and knowledge needed by frontline managers, owners/managers of small businesses and human resource specialists. A more strategic approach to overall employee relations is found in the unit BSBHR603A Manage employee relations strategies and plans in the Business Services Training Package.

**Element****Performance Criteria**

- |   |   |
|---|---|
| <b>1      Build a positive industrial relations climate</b> | <ul style="list-style-type: none"><li>1.1      Provide employees with accurate and impartial information on industrial matters likely to affect them.</li><li>1.2      Identify workplace changes or issues which may cause industrial unrest promptly and take appropriate action.</li><li>1.3      Identify potential causes of industrial unrest in external environments promptly and take appropriate action.</li><li>1.4      Create conditions of employment in accordance with relevant legislation and industrial awards/agreements.</li><li>1.5      Implement mechanisms for consulting with staff and facilitating two-way communication.</li><li>1.6      Ensure induction and training initiatives are used effectively to develop a competent workforce.</li><li>1.7      Establish consultative structures for the identification and resolution of grievances.</li></ul> |
| <b>2      Implement formal industrial procedures</b>        | <ul style="list-style-type: none"><li>2.1      Contribute to the development of formal industrial procedures in consultation with relevant parties.</li><li>2.2      Use agreed procedures to resolve employee relations in accordance with enterprise policy and legal requirements.</li><li>2.3      Monitor agreed processes and make appropriate adjustments in consultation with relevant parties.</li><li>2.4      Identify the need for and access specialist assistance in industrial relations matters when appropriate.</li></ul>   |

## Range Statement

This unit applies to all tourism and hospitality sectors. The following explanations identify how this unit may be applied in different workplaces, sectors and circumstances.

For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs.

Relevant parties to be included in consultation processes must include the following as appropriate to the industry sector:

- staff
- unions
- employer groups
- boards of management
- government.

Appropriate action in relation to potential industrial unrest may include:

- initiation of consultation processes
- further research on issues presented
- making reports and recommendations to colleagues
- accessing specialist assistance.

Conditions of employment may relate to:

- salary/wages
- penalty rates
- holidays and leave entitlements
- superannuation
- hours of work
- grievance procedures.

Formal industrial relations procedures may include:

- grievance procedures
- dispute resolutions procedures
- mediation
- conciliation
- arbitration.

## Evidence Guide

### Essential Knowledge and Skills to be Assessed

Knowledge of and skills in the following areas must be assessed as part of this unit:

- an overview of the Australian and relevant State/Territory industrial relations system, including legal obligations of employers
- the role of specific unions in the tourism/hospitality industries
- the role of specific employer groups in the tourism/hospitality industries
- provisions of awards as appropriate to the industry sector
- overview of procedures for creating workplace agreements
- procedures and specific communication skills for formal counselling, grievances and industrial dispute resolution.

### **Linkages to Other Units**

This unit must be assessed with or after the following units. These units describe skills and knowledge that are essential to this unit of competence:

- THHGCS03B Deal with conflict situations
- THHGLE01B Monitor work operations
- THHGLE08B Lead and manage people
- THHGLE09B Manage workplace diversity

Note: Knowledge of specific legal issues is required within this unit. This means that there is some duplication with the generic unit THHGLE20B Develop and update the legal knowledge required for business compliance. Repetition should be avoided in training and assessment. Formal counselling techniques are also covered in the unit THHGLE06B Monitor staff performance and repetition in training and assessment should be avoided.

For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs.

### **Critical Aspects of Assessment**

Evidence of the following is critical:

- knowledge of industrial relations issues, procedures and regulations as they apply to particular sectors
- ability to interpret industrial awards and agreements
- ability to foster the development of a positive industrial relations climate.

### **Context of Assessment and Resource Implications**

Assessment must ensure:

- project or work activities that allow the candidate to address a range of industrial relations issues relevant to tourism and hospitality workplaces
- practical demonstration of counselling skills.

### **Assessment Methods**

Assessment methods must be chosen to ensure that ability to effectively manage workplace relations can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- evaluation of projects conducted by candidate in conjunction with industry operators to address industrial relations issues
- case studies to develop approaches to different industrial relations issues
- oral or written questions to assess knowledge of industrial relations legislation, regulations and procedures
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

**Key Competencies in this Unit**

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform    Level 2 = Administer and Manage    Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	3	Scanning internal and external environments to identify and analyse potential causes of industrial unrest
Communicating Ideas and Information	3	Conducting a staff briefing on new work practices
Planning and Organising Activities	3	Organising consultation sessions
Working with Others and in Teams	3	Holding informal consultations with staff members to resolve a potential industrial problem
Using Mathematical Ideas and Techniques	1	Calculating hours of work against award provisions
Solving Problems	3	Devising and implementing an approach to a serious staff disciplinary matter
Using Technology	1	Using electronic communication to facilitate consultation with key stakeholders

**THHGLE21B****Provide mentoring support to business colleagues****Unit Descriptor**

This unit deals with the skills and knowledge required to act as a business mentor to other individuals in the industry or workplace. This role is carried out by those with significant workplace experience.

<b>Element</b>	<b>Performance Criteria</b>												
<b>1 Establish a relationship with mentoree</b>	<table><tr><td>1.1</td><td>Use effective communication styles to develop trust, confidence and rapport.</td></tr><tr><td>1.2</td><td>Make agreements on how the mentoring relationship will be conducted including:<ul style="list-style-type: none"><li>▪ the amount of time involved for both parties</li><li>▪ confidentiality of information</li><li>▪ scope of issues to be covered.</li></ul></td></tr><tr><td>1.3</td><td>Discuss and clarify expectations and goals with the mentoree.</td></tr></table>	1.1	Use effective communication styles to develop trust, confidence and rapport.	1.2	Make agreements on how the mentoring relationship will be conducted including: <ul style="list-style-type: none"><li>▪ the amount of time involved for both parties</li><li>▪ confidentiality of information</li><li>▪ scope of issues to be covered.</li></ul>	1.3	Discuss and clarify expectations and goals with the mentoree.						
1.1	Use effective communication styles to develop trust, confidence and rapport.												
1.2	Make agreements on how the mentoring relationship will be conducted including: <ul style="list-style-type: none"><li>▪ the amount of time involved for both parties</li><li>▪ confidentiality of information</li><li>▪ scope of issues to be covered.</li></ul>												
1.3	Discuss and clarify expectations and goals with the mentoree.												
<b>2 Offer mentoring support</b>	<table><tr><td>2.1</td><td>Assist the mentoree to identify and evaluate options to achieve agreed goals.</td></tr><tr><td>2.2</td><td>Share personal experiences and knowledge with the mentoree to assist in progress towards agreed goals.</td></tr><tr><td>2.3</td><td>Encourage the mentoree to make decisions and take responsibility for the courses of action or solutions under consideration.</td></tr><tr><td>2.4</td><td>Provide supportive advice and assistance in a manner which allows the mentoree to retain responsibility for achievement of his or her own goals.</td></tr><tr><td>2.5</td><td>Recognise and openly discuss changes in the mentoring relationship.</td></tr><tr><td>2.6</td><td>Make adjustments to the relationship to take account of the needs of both mentor and mentoree.</td></tr></table>	2.1	Assist the mentoree to identify and evaluate options to achieve agreed goals.	2.2	Share personal experiences and knowledge with the mentoree to assist in progress towards agreed goals.	2.3	Encourage the mentoree to make decisions and take responsibility for the courses of action or solutions under consideration.	2.4	Provide supportive advice and assistance in a manner which allows the mentoree to retain responsibility for achievement of his or her own goals.	2.5	Recognise and openly discuss changes in the mentoring relationship.	2.6	Make adjustments to the relationship to take account of the needs of both mentor and mentoree.
2.1	Assist the mentoree to identify and evaluate options to achieve agreed goals.												
2.2	Share personal experiences and knowledge with the mentoree to assist in progress towards agreed goals.												
2.3	Encourage the mentoree to make decisions and take responsibility for the courses of action or solutions under consideration.												
2.4	Provide supportive advice and assistance in a manner which allows the mentoree to retain responsibility for achievement of his or her own goals.												
2.5	Recognise and openly discuss changes in the mentoring relationship.												
2.6	Make adjustments to the relationship to take account of the needs of both mentor and mentoree.												

## Range Statement

This unit applies to all tourism and hospitality sectors. The following explanations identify how this unit may be applied in different workplaces, sectors and circumstances.

Mentors and mentorees may work within the same or different organisations.

The mentoring process may apply to any area of business or professional endeavour.

Expectations and goals for mentoring may include:

- acquisition of specific business skills
- progress with overall business development
- individual professional and personal development.

Changes in the mentoring relationship may include:

- inability of one party to continue participation
- identification of a need for assistance from others with different skills
- achievement of goals and decision to conclude the relationship
- changes in the dynamic of the relationship.

## Evidence Guide

### Essential Knowledge and Skills to be Assessed

Knowledge of and skills in the following areas must be assessed as part of this unit:

- an understanding of mentoring, its role and potential benefits
- communication skills in relation to listening, questioning, providing feedback and non-verbal communication
- significant knowledge and experience of the area of business in which the mentoree operates.

### Linkages to Other Units

This unit must be assessed alone.

### Critical Aspects of Assessment

Evidence of the following is critical:

- understanding of the role and benefits of mentoring in business.
- ability to use significant workplace knowledge and experience to assist another individual to achieve his or her agreed goals
- application of effective communication styles.

### Context of Assessment and Resource Implications

Assessment must ensure:

- activities conducted over a period of time in which the candidate provides mentoring support for a less experienced colleague.

### Assessment Methods

Assessment methods must be chosen to ensure that mentoring skills can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- evaluation of reports detailing mentoring activities undertaken by the candidate (taking account of confidentiality issues)
- interview with the mentoree to evaluate the mentor's skills
- oral or written questions to assess knowledge of the key concepts of mentoring
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

### Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform    Level 2 = Administer and Manage    Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	3	Assessing the mentoree's current skill base and possible areas where assistance may be needed
Communicating Ideas and Information	3	Discussing possible approaches and ideas with the mentoree
Planning and Organising Activities	2	Working out a program or contact and activities with the mentoree
Working with Others and in Teams	3	Assisting the mentoree to develop solutions
Using Mathematical Ideas and Techniques	-	-
Solving Problems	3	Dealing with a situation where conflict arises with the mentoree
Using Technology	1	Using electronic communication to facilitate the mentoring process

**THHGLE11B****Manage quality customer service****Unit Descriptor**

This unit deals with the skills and knowledge required to manage customer service quality in the workplace within a tourism or hospitality context. It focuses on the need to develop proactive approaches to service quality issues with some strategic focus. Managers and some supervisors would generally undertake this role. This unit equates to unit BSBMGT610A Manage customer focus in the Business Services Training Package.

<b>Element</b>	<b>Performance Criteria</b>
<b>1 Develop approaches to enhance customer service quality</b>	<ul style="list-style-type: none"><li>1.1 Obtain information on customer needs, expectations and satisfaction levels using both informal and formal research.</li><li>1.2 Provide opportunities for customers and colleagues to provide feedback on products and services.</li><li>1.3 Review changes in internal and external environments and integrate findings into planning for quality service.</li><li>1.4 Provide opportunities for colleagues to participate in the customer service planning process.</li><li>1.5 Develop standards and plans to address key quality service issues.</li></ul>
<b>2 Manage the delivery of quality service</b>	<ul style="list-style-type: none"><li>2.1 Communicate customer service standards and expectations clearly to colleagues.</li><li>2.2 Provide access to information on service standards and delivery to colleagues.</li><li>2.3 Use coaching to assist colleagues to deal with customer service issues and to take responsibility for service outcomes.</li><li>2.4 Monitor customer service in the workplace to ensure standards are met in accordance with enterprise policies and procedures.</li></ul>
<b>3 Monitor and adjust customer service</b>	<ul style="list-style-type: none"><li>3.1 Seek feedback from customers on an ongoing basis and use this to improve performance where applicable.</li><li>3.2 Identify customer service problems and make adjustments to standards, systems and procedures to ensure continued service quality.</li><li>3.3 Communicate new approaches to all those involved in service delivery within appropriate timeframes.</li></ul>



## Range Statement

This unit applies to all tourism and hospitality sectors. The following explanations identify how this unit may be applied in different workplaces, sectors and circumstances.

For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs.

Customer service issues and standards may relate to:

- response times
- service guarantees
- pricing guarantees
- product quality
- document presentation standards
- personal presentation standards
- complaint management.

Informal and formal research on customer needs may include:

- talking to customers
- qualitative or quantitative research
- seeking feedback from service delivery colleagues
- analysis of competitive environment
- analysis of industry and market trends.

Changes in internal and external environments impacting on quality service planning may include:

- management changes
- organisational re-structures
- introduction of new equipment
- recruitment practices
- technological changes affecting service delivery
- changes in the competitive environment
- economic climate
- trends in customer preferences
- advent of E-business.

## Evidence Guide

### Essential Knowledge and Skills to be Assessed

Knowledge of and skills in the following areas must be assessed as part of this unit:

- the roles and responsibilities of management in ensuring quality service within an enterprise
- the concept of total quality service and total quality management and its application to the tourism and hospitality industry
- the role of continuous improvement and benchmarking in quality assurance
- methods of implementing quality assurance in the workplace including:
  - establishing standards
  - monitoring
  - staff involvement and reward
  - evaluation

- overview of the range of market research techniques used to gain information on customer preferences
- legislation that impacts on customer service standards and delivery including relevant requirements under State Fair Trading legislation
- industry schemes that impact on customer service standards and delivery (eg. accreditation schemes, codes of conduct).

### **Linkages to Other Units**

This unit must be assessed with or after the following units. These units describe skills and knowledge that are essential to this unit of competence:

- THHGLE08B Lead and manage people

There is also a strong link between this unit and other leadership units. Depending upon the industry sector and workplace, combined delivery and assessment may be appropriate with those units.

Note: Knowledge of specific legal issues is required within this unit. This means that there is some duplication with the generic unit THHGLE20B Develop and update the legal knowledge required for business compliance. Repetition should be avoided in training and assessment. For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs.

### **Critical Aspects of Assessment**

Evidence of the following is critical:

- ability to develop pro-active approaches to the delivery and monitoring of quality customer service within a specific tourism/hospitality context
- knowledge of quality service principles and processes.

### **Context of Assessment and Resource Implications**

Assessment must ensure:

- project or work activities conducted over a period of time to allow the candidate to establish, monitor and evaluate service delivery in a tourism or hospitality context (eg. management of an event, running of a tour)
- involvement of a team for which the candidate is leader.

### **Assessment Methods**

Assessment methods must be chosen to ensure that management of service delivery can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- evaluation of projects managed by the candidate in conjunction with industry to enhance service delivery in a given operation
- evaluation of projects managed by the candidate to create, market and deliver a tourism or hospitality service
- case studies to address specific service delivery issues in different workplace contexts
- oral or written questions to assess knowledge of quality assurance concepts and principles
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

**Key Competencies in this Unit**

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform    Level 2 = Administer and Manage    Level 3 = Design and Evaluate

<b>Key Competencies</b>	<b>Level</b>	<b>Examples</b>
Collecting, Organising and Analysing Information	3	Identifying, accessing and analysing information and research on service provision for integration into new customer service plans
Communicating Ideas and Information	3	Writing a section of a business plan for submission to the bank about the service strategies to be used in a given business
Planning and Organising Activities	3	Managing a structured program to gain staff and customer feedback on service quality issues
Working with Others and in Teams	3	Using techniques to build team involvement in planning the enhancement of service quality
Using Mathematical Ideas and Techniques	1	Calculating service capability (eg. numbers of customers who can be served in a given timeframe)
Solving Problems	3	Developing a new approach to improving service levels in an area where there has been an ongoing problem with service delivery
Using Technology	1	Using spreadsheet technology to monitor customer feedback

**THHGLE12B****Develop and manage marketing strategies****Unit Descriptor**

This unit deals with the skills and knowledge required to develop and manage marketing plans and strategies within a tourism and hospitality context. It focuses on planning, monitoring and evaluation. The actual conduct of activities, which generally takes place within the framework of marketing plans, is covered in various other units such as THHGCS07B Co-ordinate marketing activities and THTSMA01B Co-ordinate the production of brochures and marketing materials. This unit equate to the units BSBMKG01A Research the market and BSBMKG403A Develop marketing strategies in the Business Services Training Package.

**Element****Performance Criteria**

<b>1      Collect and analyse information on the internal business environment</b>	1.1	Identify and confirm core activities, customer base, business values and current business direction.
	1.2	Identify and analyse information on current and past marketing and its effectiveness.
	1.3	Review performance information from all areas of the business to identify strengths, weaknesses and critical success factors.
	1.4	Identify and record current capabilities and resources, including the need for specialist assistance.
	1.5	Identify any under-performing products and services and analyse and report on reasons for under-performance.
	1.6	Record and report information in accordance with enterprise requirements.
<b>2      Collect and analyse information on the external business environment</b>	2.1	Identify and analyse information on expected market growth or decline with associated risk factors.
	2.2	Record and analyse projected changes in the labour force, population and economic activity.
	2.3	Gather and analyse comparative market information.
	2.4	Identify and analyse industry and customer trends and developments, including emerging issues and technology.
	2.5	Identify and analyse the legal, ethical and environmental constraints of the market and potential business impacts.
	2.6	Record and report information in accordance with enterprise requirements.

- |          |   |     |   |
|----------|---|-----|---|
| <b>3</b> | <b>Prepare marketing strategies or plans</b>      | 3.1 | Identify and analyse opportunities based on internal and external market analysis.  |
|          |   | 3.2 | Develop strategies that are consistent with the direction, values and business plans of the enterprise.                       |
|          |   | 3.3 | Develop strategies in consultation with key stakeholders.   |
|          |   | 3.4 | Prepare marketing strategies to meet legal and ethical requirements.  |
|          |   | 3.5 | Provide timely opportunities for colleagues to contribute to the marketing plan.  |
|          |   | 3.6 | Submit marketing plan for approval where appropriate in accordance with enterprise policy.                                    |
|          |   |     |   |
| <b>4</b> | <b>Implement and monitor marketing activities</b> | 4.1 | Define and communicate clearly all priorities, responsibilities, timelines and budgets, involving all appropriate colleagues. |
|          |   | 4.2 | Implement and monitor actions detailed in the plan in a cost-efficient manner and according to schedule and contingencies.    |
|          |   | 4.3 | Produce reports in accordance with enterprise policy.   |
|          |   | 4.4 | Share information on marketing activities with operational staff to maintain awareness of current enterprise focus.           |
|          |   |     |   |
| <b>5</b> | <b>Conduct ongoing evaluation</b>                 | 5.1 | Evaluate marketing activities using agreed methods and benchmarks.  |
|          |   | 5.2 | Make adjustments in accordance with evaluation.   |
|          |   | 5.3 | Communicate and implement agreed changes promptly.  |

## Range Statement

This unit applies to all tourism and hospitality sectors. The following explanations identify how this unit may be applied in different workplaces, sectors and circumstances.

For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs.

Marketing plans and strategies may be for:

- a specific product or service (new or existing)

- a small/medium sized business enterprise
- a destination
- a single event.

Sources of information may include:

- peers
- Internet
- official statistics
- government agencies
- industry associations
- business advisory services
- financial institutions
- industry publications.

Capabilities and resources may include:

- human resources
- financial resources
- equipment capacity
- staff skill levels
- hours of operation
- communication capabilities
- location/position
- E-business capacity.

Trends and developments may be:

- economic
- ecological/environmental
- government activities
- social and cultural
- demographic
- technology
- industrial.

Comparative market information may include:

- best practice information
- benchmarking
- competitor information.

Legal and ethical constraints may include:

- legislation
- regulation
- codes of practice
- cultural expectations and influences
- social responsibilities (eg. protection of children, environmental issues).

## **Evidence Guide**

### **Essential Knowledge and Skills to be Assessed**

Knowledge of and skills in the following areas must be assessed as part of this unit:

- data collection tools and methodologies
- marketing planning techniques and formats
- internal and external issues which impact on market planning in a given industry context

- in-depth knowledge of tourism and hospitality industry marketing and distribution networks
- legal issues that impact on marketing activities including Trade Practices and Fair Trading legislation
- research and analytical skills to analyse internal and external business environments.

### **Linkages to Other Units**

There is a very strong link between this unit and the following unit. Both units focus on planning and depending upon the industry sector and workplace, combined delivery and assessment may be appropriate.

- THHGLE03B Develop and implement operational plans

Note: Knowledge of specific legal issues is required within this unit. This means that there is some duplication with the generic unit THHGLE20B Develop and update the legal knowledge required for business compliance. Repetition should be avoided in training and assessment. For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs.

### **Critical Aspects of Assessment**

Evidence of the following is critical:

- ability to develop a marketing strategy for a specific tourism and/or hospitality product, service or enterprise. Plans should identify current and relevant industry enterprise marketing issues and include a detailed, realistic implementation program
- knowledge and understanding of specific implementation and monitoring issues.

### **Context of Assessment and Resource Implications**

Assessment must ensure:

- project or work activities conducted over a period of time to allow the candidate to both develop and implement a marketing strategy for a given product or service
- development and implementation of a marketing strategy which targets and involves individuals or businesses who have a genuine interest or potential in purchasing the product or service
- involvement of stakeholders in the planning process
- involvement of customers to whom products and services are marketed.

### **Assessment Methods**

Assessment methods must be chosen to ensure that marketing planning and implementation can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- evaluation of the marketing aspects of a project conducted by the candidate either alone or in conjunction with industry
- evaluation of reports prepared by the candidate detailing marketing plans and results achieved
- case studies to assess application of marketing planning to different industry situations and contexts
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

**Key Competencies in this Unit**

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform    Level 2 = Administer and Manage    Level 3 = Design and Evaluate

<b>Key Competencies</b>	<b>Level</b>	<b>Examples</b>
Collecting, Organising and Analysing Information	3	Sourcing and analysing destination visitation data for its impact on a particular product or service
Communicating Ideas and Information	3	Writing a marketing plan
Planning and Organising Activities	3	Co-ordinating the consultation and research phases for the development of a marketing plan
Working with Others and in Teams	3	Conducting a brainstorming session to gain staff input into the planning process
Using Mathematical Ideas and Techniques	1	Calculating budget figures for marketing activities
Solving Problems	3	Developing new marketing approaches for products or services which have so far failed to meet performance expectations
Using Technology	2	Integrating new technology into various marketing activities



**THHGLE13B****Manage finances within a budget****Unit Descriptor**

This unit deals with the skills and knowledge required to take responsibility for budget management where others may have developed the budget. The skills and knowledge for budget development are therefore not included and usually by managers and supervisors. These skills are covered in unit THHGLE14B Prepare and monitor budgets. Combined training and assessment of these units may be appropriate.

<b>Element</b>		<b>Performance Criteria</b>	
<b>1</b>	<b>Allocate budget resources</b>	1.1	Allocate funds according to agreed priorities.
		1.2	Discuss changes in income and expenditure priorities with appropriate colleagues prior to implementation.
		1.3	Consult and inform all relevant personnel in relation to resource decisions.
		1.4	Promote awareness of the importance of budget control.
		1.5	Maintain detailed records of resource allocation in accordance with enterprise control systems.
<b>2</b>	<b>Monitor financial activities against budget</b>	2.1	Check actual income and expenditure against budgets accurately and at regular intervals.
		2.2	Include financial commitments in all documentation to ensure accurate monitoring.
		2.3	Identify and report deviations according to enterprise policy and significance of deviation.
		2.4	Investigate appropriate options for more effective management of deviations.
		2.5	Advise appropriate colleagues of budget status in relation to targets within agreed timeframes.

<b>3 Identify and evaluate options for improved budget performance</b>	3.1	Assess existing costs and resources and identify areas for improvement.
	3.2	Discuss desired outcomes with relevant colleagues.
	3.3	Undertake appropriate research to investigate new approaches.
	3.4	Define and communicate clearly the benefits and disadvantages of new approaches.
	3.5	Take account of impacts on customer service levels and colleagues in developing new approaches.
	3.6	Present recommendations clearly and logically to the appropriate person/department.
<b>4 Complete financial/statistical reports</b>	4.1	Complete all required financial and statistical reports accurately and within designated timelines.
	4.2	Produce clear and concise information to enable informed decision-making.
	4.3	Forward reports promptly to the appropriate person/department.

### Range Statement

This unit may apply to various staff in all tourism and hospitality sectors. The following explanations identify how this unit may be applied in different workplaces, tourism sectors and circumstances.

For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs.

Budgets may include:

- cash budgets
- departmental budgets
- wages budgets
- project budgets
- purchasing budgets
- sales budgets
- cashflow budgets
- budgets for a small business.

Financial and statistical reports may relate to:

- daily, weekly, monthly transactions and reports
- break-up by department
- occupancy
- sales performance

- commission earnings
- sales returns
- yield management
- commercial account activity.

Research to investigate new approaches may include:

- discussions with existing suppliers
- sourcing of new suppliers
- evaluation of staffing/rostering requirements
- review of operating procedures
- potential rostering changes.

## **Evidence Guide**

### **Essential Knowledge and Skills to be Assessed**

Knowledge of and skills in the following areas must be assessed as part of this unit:

- knowledge and understanding of budgets, specifically how a budget is structured and how to interpret a budget
- any legislative requirements in specific relation to disbursement of funds and record keeping
- techniques and related to maximising budget performance relevant to the enterprise or industry sector
- budgeting terminology relevant to a specific industry context
- financial reporting procedures and cycles relevant to the enterprise or industry sector.

### **Linkages to Other Units**

This unit must be assessed with or after the following unit. This unit describes the skills and knowledge essential to this unit of competence:

- THHGF06A Interpret financial information

The unit also has strong linkages to a range of other financial and management units and combined assessment and training would be appropriate. Examples include:

- THHGLE01B Monitor work operations
- THHGLE14B Prepare and monitor budgets

### **Critical Aspects of Assessment**

Evidence of the following is critical:

- knowledge of basic budget principles and structures
- budgeting terminology relevant to a specific industry context
- ability to monitor income and expenditure in accordance with the budget, and to identify ways of improving budget performance
- understanding of the main types of budget that apply in the specific enterprise or industry context.

### **Context of Assessment and Resource Implications**

Assessment must ensure:

- project or work activities that include the management of and reporting on a budget for a specific project or operational area over a period of time so that the monitoring and implementation aspects of the unit can be assessed
- use of figures and data that reflect the financial operating conditions of industry
- the requirement to evaluate options for improved budget performance.

## Assessment Methods

Assessment methods must be chosen to ensure that budget management skills can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- evaluation of financial reports detailing financial performance of projects or activities conducted by the candidate
- evaluation of reports produced by the candidate detailing the processes undertaken to manage finances within a budget
- case studies and problem solving to assess application of the principles of budget management to different situations
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

## Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform    Level 2 = Administer and Manage    Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	2	Researching a new supplier to reduce expenditure in a given area of the budget
Communicating Ideas and Information	2	Preparing a memorandum to senior management proposing a change in operating procedure to achieve greater efficiencies
Planning and Organising Activities	3	Organising the regular flow of data to ensure effective monthly reporting
Working with Others and in Teams	2	Liaising with suppliers to investigate ways of achieving cost-efficiencies
Using Mathematical Ideas and Techniques	2	Adjusting budget items to creating different performance scenarios
Solving Problems	3	Making adjustments to address a situation where the need for an extraordinary expense threatens to result in a negative quarterly performance
Using Technology	1	Interrogating a computerised accounting package for reports to assist in allocation planning

**THHGLE14B****Prepare and monitor budgets****Unit Descriptor**

This unit deals with the skills and knowledge required usually by managers and supervisors to prepare and monitor budgets. As such it builds on the skills in unit THHGLE13B Manage finances within a budget. While the nature of the budget may vary, the unit focuses on the key managerial skills of analysing financial information to inform the budget development process, drafting a budget and the vital role of monitoring budget performance over time.

**Element****Performance Criteria****1 Prepare budget information**

- 1.1 Identify and interpret data and data sources required for budget preparation in a given context correctly.
- 1.2 Review and analyse data for applicability in readiness for budget preparation.
- 1.3 Where appropriate, follow directives from senior management or organising committees.
- 1.4 Analyse internal and external environments to identify potential impacts on budget.
- 1.5 Provide relevant colleagues with the opportunity to contribute to the budget planning process with adequate notice.

- |                                    |  |
|------------------------------------|--|
| <b>2 Prepare budget</b>            | <ul style="list-style-type: none"><li>2.1 Draft budget, based on analysis of all available information and in accordance with enterprise policy.</li><li>2.2 Estimate income and expenditure and support with valid, reliable and relevant information, including income and expenditure for previous time periods.</li><li>2.3 Assess and present alternative approaches where appropriate.</li><li>2.4 Present recommendations clearly, concisely and in an appropriate format.</li><li>2.5 Reflect enterprise objectives appropriately within the draft budget.</li><li>2.6 Circulate the draft budget to appropriate individuals for comment.</li><li>2.7 Negotiate budget in accordance with enterprise policy and procedures.</li><li>2.8 Agree and incorporate modifications accurately and in consultation with colleagues.</li><li>2.9 Complete the final budget in required format within designated timelines.</li><li>2.10 Inform colleagues of final budget decisions and ramifications in a timely manner.</li></ul> |
| <b>3 Monitor and review budget</b> | <ul style="list-style-type: none"><li>3.1 Review budget regularly to assess actual performance against estimated performance and prepare accurate financial reports.</li><li>3.2 Incorporate all financial commitments promptly and accurately into budget and all budget reports.</li><li>3.3 Investigate and take appropriate action on significant deviations.</li><li>3.4 Analyse changes in the internal and external environment during budget review, and make adjustments accordingly.</li><li>3.5 Collect and record relevant information to assist in future budget preparation.</li></ul>   |

## Range Statement

This unit may apply to various staff in all tourism and hospitality sectors. The following explanations identify how this unit may be applied in different workplaces, tourism sectors and circumstances.

For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs.

Budgets may include:

- cash budgets
- departmental budgets
- wages budgets
- project budgets
- event budgets
- sales budgets
- cashflow budgets
- grant funding budgets
- budgets for a small business.

Data and data sources required for budget preparation may include:

- performance data from previous periods
- financial proposals from key stakeholders
- financial information from suppliers
- customer or supplier research
- competitor research
- management policies and procedures
- enterprise budget preparation guidelines
- declared commitments in given areas of operation
- grant funding guidelines or limitations.

Internal and external issues that could impact on budget development may include:

- organisational and management re-structures
- enterprise/organisational objectives
- new legislation or regulation
- growth or decline in economic conditions
- significant price movement for certain commodities or items
- shift in market trends
- scope of the project
- venue availability (for events)
- human resource requirements.

Financial reports may include:

- periodic reports showing budget versus year-to-date actuals and financial commitments
- periodic sales reports
- taxation commitments
- funding acquittals in relation to grants received.

## Evidence Guide

### Essential Knowledge and Skills to be Assessed

Knowledge of and skills in the following areas must be assessed as part of this unit:

- the role of different types of budget within tourism and hospitality businesses
- the nature of the budget development process within different tourism and hospitality businesses and contexts
- budget preparation and monitoring principles, practices and techniques including:
  - information required for budget preparation
  - components of a budget
  - techniques for making budget estimates
  - type of supporting information required
  - components of a budget performance report
  - use of software for preparing and monitoring budgets
  - how to present budgets and budget reports
  - budget deviation management, including common reasons for deviations
- capabilities of software in relation to the budget development and monitoring process
- negotiation techniques in specific relation to budgetary planning.

### Linkages to Other Units

This unit must be assessed with or after the following unit. This unit describes the skills and knowledge essential to this unit of competence:

- THHGLE13B Manage finances within a budget

This unit also has linkages to a range of other management units and combined assessment and training may be appropriate.

### Critical Aspects of Assessment

Evidence of the following is critical:

- understanding of the technical budget preparation processes and procedures that must be followed
- ability to prepare realistic and accurate budgets within the context of a tourism or hospitality workplace
- ability to analyse the internal and external factors that impact on the budget development process.

### Context of Assessment and Resource Implications

Assessment must ensure:

- project or work activities conducted over a period of time so that the monitoring and implementation aspects of the unit can be assessed
- budget development within typical workplace time constraints
- involvement of multiple stakeholders in the budget development and monitoring process
- use of industry-current technology for the budget preparation process.



## Assessment Methods

Assessment methods must be chosen to ensure that the budget development and monitoring process can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- evaluation of budgets versus financial performance of projects managed by the candidate
- evaluation of reports produced by the candidate detailing the processes undertaken to develop a budget
- direct observation of the candidate providing a briefing or negotiating on a proposed budget
- case studies and problem solving to assess application of the principles of budget management to different situations
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

## Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform    Level 2 = Administer and Manage    Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	3	Gathering and analysing data to assist in the budget development process
Communicating Ideas and Information	2	Providing a briefing on your draft budget to a more senior Manager
Planning and Organising Activities	3	Organising the consultation process before and during the budget development phase
Working with Others and in Teams	2	Discussing/negotiating potential budget adjustments with colleagues
Using Mathematical Ideas and Techniques	2	Developing different budget scenarios
Solving Problems	3	Investigating a significant expenditure deviation and developing a solution to ensure budget targets are maintained
Using Technology	2	Using the budgetary planning tools within an accounting software package

**THHGLE15B****Manage financial operations****Unit Descriptor**

This unit deals with the skills and knowledge required to oversee the day-to-day financial operations of a small tourism or hospitality enterprise or a department within a larger organisation. The unit is not intended to cover detailed specialist accounting skills that are undertaken by qualified accountants or financial controllers, but does include the awareness of accounting issues and concepts needed by managers for effective communication with accountants or other specialists on financial matters.

<b>Element</b>	<b>Performance Criteria</b>
<b>1      Develop approaches to financial management</b>	<ul style="list-style-type: none"><li>1.1      Assess the scope of financial management requirements for a given enterprise or project.</li><li>1.2      Identify the need for and organise specialist accounting assistance where appropriate.</li><li>1.3      Develop approaches to financial management based on overall direction and goals of the enterprise or project.</li><li>1.4      Develop financial management systems and procedures in accordance with enterprise needs.</li></ul>
<b>2      Develop and monitor financial procedures and systems</b>	<ul style="list-style-type: none"><li>2.1      Communicate the importance of financial objectives, management controls and systems to all staff.</li><li>2.2      Develop procedures and systems to meet relevant statutory and internal control requirements.</li><li>2.3      Develop practical procedures and systems for monitoring income and ensuring payment of accounts.</li><li>2.4      Research and integrate the use of current industry practices and technology into systems as appropriate</li><li>2.5      Check compliance with procedures and systems on a regular basis.</li><li>2.6      Monitor the flow of financial information within the organisation in terms of currency, accuracy, level of detail and relevance.</li><li>2.7      Review financial management systems regularly and make adjustments made in accordance with enterprise need.</li></ul>

- |   |   |     |   |     |   |     |   |     |   |     |  |     |   |
|---|---|-----|---|-----|---|-----|---|-----|---|-----|--|-----|---|
| <b>3      Make pricing decisions</b>        | <table border="0"><tr><td style="vertical-align: top; padding-right: 10px;">3.1</td><td>Make pricing decisions based on current, sufficient, accurate and relevant financial and marketplace data.</td></tr><tr><td style="vertical-align: top; padding-right: 10px;">3.2</td><td>Identify fixed, variable and semi-variable costs accurately.</td></tr><tr><td style="vertical-align: top; padding-right: 10px;">3.3</td><td>Perform and interpret simple cost – volume – profit analysis correctly.</td></tr><tr><td style="vertical-align: top; padding-right: 10px;">3.4</td><td>Set appropriate profit margins in accordance with enterprise policy and calculate prices correctly.</td></tr></table>  | 3.1 | Make pricing decisions based on current, sufficient, accurate and relevant financial and marketplace data.  | 3.2 | Identify fixed, variable and semi-variable costs accurately.                                    | 3.3 | Perform and interpret simple cost – volume – profit analysis correctly.           | 3.4 | Set appropriate profit margins in accordance with enterprise policy and calculate prices correctly. |     |  |     |   |
| 3.1   | Make pricing decisions based on current, sufficient, accurate and relevant financial and marketplace data.  |     |   |     |   |     |   |     |   |     |  |     |   |
| 3.2   | Identify fixed, variable and semi-variable costs accurately.  |     |   |     |   |     |   |     |   |     |  |     |   |
| 3.3   | Perform and interpret simple cost – volume – profit analysis correctly.   |     |   |     |   |     |   |     |   |     |  |     |   |
| 3.4   | Set appropriate profit margins in accordance with enterprise policy and calculate prices correctly.   |     |   |     |   |     |   |     |   |     |  |     |   |
| <b>4      Monitor financial performance</b> | <table border="0"><tr><td style="vertical-align: top; padding-right: 10px;">4.1</td><td>Monitor budgets against performance targets on a regular basis.</td></tr><tr><td style="vertical-align: top; padding-right: 10px;">4.2</td><td>Negotiate corrective budgets as appropriate to maximise business performance.</td></tr><tr><td style="vertical-align: top; padding-right: 10px;">4.3</td><td>Take remedial action to address financial performance problems where appropriate.</td></tr><tr><td style="vertical-align: top; padding-right: 10px;">4.4</td><td>Prepare and interpret profit and loss statements accurately with appropriate level of detail.</td></tr><tr><td style="vertical-align: top; padding-right: 10px;">4.5</td><td>Conduct financial ratio analysis correctly and apply the information to financial management and reporting as appropriate.</td></tr><tr><td style="vertical-align: top; padding-right: 10px;">4.6</td><td>Communicate feedback on positive and negative performance to appropriate colleagues in an appropriate manner.</td></tr></table> | 4.1 | Monitor budgets against performance targets on a regular basis.   | 4.2 | Negotiate corrective budgets as appropriate to maximise business performance.                   | 4.3 | Take remedial action to address financial performance problems where appropriate. | 4.4 | Prepare and interpret profit and loss statements accurately with appropriate level of detail.       | 4.5 | Conduct financial ratio analysis correctly and apply the information to financial management and reporting as appropriate. | 4.6 | Communicate feedback on positive and negative performance to appropriate colleagues in an appropriate manner. |
| 4.1   | Monitor budgets against performance targets on a regular basis.   |     |   |     |   |     |   |     |   |     |  |     |   |
| 4.2   | Negotiate corrective budgets as appropriate to maximise business performance.   |     |   |     |   |     |   |     |   |     |  |     |   |
| 4.3   | Take remedial action to address financial performance problems where appropriate.   |     |   |     |   |     |   |     |   |     |  |     |   |
| 4.4   | Prepare and interpret profit and loss statements accurately with appropriate level of detail.   |     |   |     |   |     |   |     |   |     |  |     |   |
| 4.5   | Conduct financial ratio analysis correctly and apply the information to financial management and reporting as appropriate.  |     |   |     |   |     |   |     |   |     |  |     |   |
| 4.6   | Communicate feedback on positive and negative performance to appropriate colleagues in an appropriate manner.   |     |   |     |   |     |   |     |   |     |  |     |   |
| <b>5      Prepare financial reports</b>     | <table border="0"><tr><td style="vertical-align: top; padding-right: 10px;">5.1</td><td>Prepare accurate, concise, relevant and sufficiently detailed financial reports to schedule in a format appropriate to the audience and in accordance with enterprise and statutory requirements.</td></tr><tr><td style="vertical-align: top; padding-right: 10px;">5.2</td><td>Identify the need for and access specialist advice on reporting requirements where appropriate.</td></tr></table>  | 5.1 | Prepare accurate, concise, relevant and sufficiently detailed financial reports to schedule in a format appropriate to the audience and in accordance with enterprise and statutory requirements. | 5.2 | Identify the need for and access specialist advice on reporting requirements where appropriate. |     |   |     |   |     |  |     |   |
| 5.1   | Prepare accurate, concise, relevant and sufficiently detailed financial reports to schedule in a format appropriate to the audience and in accordance with enterprise and statutory requirements.   |     |   |     |   |     |   |     |   |     |  |     |   |
| 5.2   | Identify the need for and access specialist advice on reporting requirements where appropriate.   |     |   |     |   |     |   |     |   |     |  |     |   |

## Range Statement

This unit applies to all tourism and hospitality sectors. The following explanations identify how this unit may be applied in different workplaces, tourism sectors and circumstances.

For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs.

Financial operations may be for:

- a department within a large organisation
- a small business.

The scope of financial management requirements for different projects or enterprises will vary and may relate to differing requirements for:

- budgeting and forecasting
- reporting (depth, regularity, nature of reports)
- control mechanisms
- specialist financial skills.

Tourism and hospitality businesses often employ specialist accounting assistance and this will vary depending upon the size and nature of the business and the financial skills available within the business. Those responsible for managing financial operations need to be able to identify the need for this assistance.

Financial procedures and systems must address the following:

- transaction recording
- checking and reconciliation processes
- banking procedures
- invoicing
- accounts payable
- cash management and security measures
- cashflow management
- budget management
- reporting requirements
- GST and other taxation requirements
- statutory requirements that apply to the specific business structure
- sector specific requirements such as the Travel Compensation Fund in retail travel.

Financial procedures and systems may cover the following:

- stock control
- financial responsibilities within an organisation/department.

Statutory and internal control requirements will vary according to business structure.

Financial reports must include:

- GST reports/Business Activity Statements
- cashflow statements
- profit and loss statements
- balance sheets
- reconciliations.

## **Evidence Guide**

### **Essential Knowledge and Skills to be Assessed**

Knowledge of and skills in the following areas must be assessed as part of this unit:

- the different financial management roles for given industry sectors or types of business including operational managers, owner/operators, financial controllers and external accountants/auditors
- the aspects of financial management which must be considered for a given enterprise or industry sector
- the ways in which financial management interrelates with all other areas of activity within a business

- the major steps in the total accounting process and the relationship of each with business operations and reporting requirements
- typical financial management systems and technology as relevant to the enterprise or industry sector including the features and capabilities of one or more computerised accounting packages
- key features of and how to prepare the main financial reports used to monitor business performance including:
  - profit and loss statements
  - balance sheets
  - sales and receivables reports
- techniques for calculating profit margins relevant to a given industry sector
- overview of specific financial/taxation regulations and requirements relevant to the industry sector including how GST applies to particular business operations and GST reporting requirements
- overview of economic issues which affect financial performance in specific industry contexts.

### **Linkages to Other Units**

This unit must be assessed with or after the following units. These units describe skills and knowledge that are essential to this unit of competence:

- THHGFA06A Interpret financial information
- THHGLE13B Manage finances within a budget
- THHGLE14B Prepare and monitor budgets
- THHGLE21B Develop and maintain the legal knowledge required for business compliance

### **Critical Aspects of Assessment**

Evidence of the following is critical:

- understanding of the total financial management process within a business
- ability to integrate the financial management activities of a business with overall business operations
- knowledge of financial control, reporting and monitoring systems.

### **Context of Assessment and Resource Implications**

Assessment must ensure:

- project or work activities that include the requirement for the establishment and management of financial systems and which are conducted over a period of time so that the monitoring and implementation aspects of the unit can be assessed
- use of figures and data that reflect the financial operating conditions of industry
- demonstration of skills using appropriate computer technology.

### **Assessment Methods**

Assessment methods must be chosen to ensure that financial management skills can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- evaluation of financial reports detailing financial performance of projects or activities conducted by the candidate
- evaluation of financial management strategies produced by the candidate detailing systems and procedures for the management of given business operations or situations

- case studies and problem solving to assess application of financial management strategies to particular situations
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

### **Key Competencies in this Unit**

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform    Level 2 = Administer and Manage    Level 3 = Design and Evaluate

<b>Key Competencies</b>	<b>Level</b>	<b>Examples</b>
Collecting, Organising and Analysing Information	3	Evaluating all aspects of operations to determine precise requirements for financial control mechanisms
Communicating Ideas and Information	3	Developing an Operations Manual which includes systems and procedures for financial management
Planning and Organising Activities	3	Establishing and monitoring schedules for financial reporting
Working with Others and in Teams	3	Conducting a brainstorming session with colleagues on minimising waste
Using Mathematical Ideas and Techniques	2	Calculating prices and profit margins
Solving Problems	3	Developing a solution to address consistent errors in financial reports
Using Technology	2	Using features of accounting software to improve business performance reporting

# E-business

**COMPETENCY STANDARDS FOR THE CARAVAN  
INDUSTRY TRAINING PACKAGE**





# CONTENTS

## **E-BUSINESS** **1**

---

<b>THHGCT04A</b>	<b>PARTICIPATE IN CO-OPERATIVE ONLINE MARKETING INITIATIVES FOR THE TOURISM INDUSTRY</b>	<b>1</b>
<b>BSBEBUS501A</b>	<b>EVALUATE E-BUSINESS OPPORTUNITIES</b>	<b>5</b>
<b>BSBEBUS502A</b>	<b>EVALUATE E-BUSINESS MODELS</b>	<b>11</b>
<b>BSBEBUS603A</b>	<b>EVALUATE NEW TECHNOLOGIES FOR BUSINESS</b>	<b>15</b>
<b>BSBEBUS601A</b>	<b>DEVELOP AN E-BUSINESS STRATEGY</b>	<b>19</b>
<b>BSBEBUS602A</b>	<b>DEVELOP AN ACTION PLAN FOR AN E-BUSINESS STRATEGY</b>	<b>25</b>
<b>BSBEBUS504A</b>	<b>IMPLEMENT AN E-BUSINESS STRATEGY</b>	<b>31</b>
<b>BSBEBUS613A</b>	<b>DEVELOP ONLINE CUSTOMER SERVICE STRATEGIES</b>	<b>36</b>
<b>BSBEBUS614A</b>	<b>BUILD ONLINE CUSTOMER LOYALTY</b>	<b>41</b>
<b>BSBEBUS408A</b>	<b>IMPLEMENT AND MONITOR DELIVERY OF QUALITY CUSTOMER SERVICE ONLINE</b>	<b>46</b>
<b>BSBEBUS604A</b>	<b>DEVELOP A BUSINESS WEBSITE STRATEGY</b>	<b>52</b>
<b>BSBEBUS507A</b>	<b>MANAGE THE BUSINESS ASPECTS OF A WEBSITE</b>	<b>58</b>
<b>BSBEBUS407A</b>	<b>REVIEW AND MAINTAIN THE BUSINESS ASPECTS OF A WEBSITE</b>	<b>62</b>
<b>THHGCT05A</b>	<b>BUILD AND LAUNCH A WEBSITE FOR A SMALL BUSINESS</b>	<b>66</b>
<b>CUFIMA01A</b>	<b>PRODUCE AND MANIPULATE DIGITAL IMAGES</b>	<b>73</b>
<b>BSBEBUS521A</b>	<b>PLAN E-MARKETING COMMUNICATIONS</b>	<b>78</b>
<b>BSBEBUS522A</b>	<b>CONDUCT E-MARKETING COMMUNICATIONS</b>	<b>83</b>
<b>BSBEBUS401A</b>	<b>CONDUCT ONLINE RESEARCH</b>	<b>88</b>
<b>BSBEBUS516A</b>	<b>MANAGE ONLINE PURCHASING</b>	<b>94</b>
<b>BSBEBUS517A</b>	<b>MANAGE ONLINE INVENTORY</b>	<b>100</b>
<b>BSBEBUS519A</b>	<b>MANAGE ONLINE SALES SYSTEMS</b>	<b>104</b>
<b>BSBEBUS520A</b>	<b>MANAGE ONLINE PAYMENTS SYSTEMS</b>	<b>109</b>
<b>BSBEBUS404A</b>	<b>TRADE ONLINE</b>	<b>114</b>
<b>BSBEBUS405A</b>	<b>CONDUCT ONLINE FINANCIAL TRANSACTIONS</b>	<b>120</b>
<b>ICAITS193A</b>	<b>CONNECT A WORKSTATION TO THE INTERNET</b>	<b>125</b>
<b>ICAITS017C</b>	<b>MAINTAIN SYSTEM INTEGRITY</b>	<b>129</b>
<b>BSBEBUS302A</b>	<b>USE AND MAINTAIN ELECTRONIC MAIL SYSTEM</b>	<b>134</b>
<b>BSBEBUS403A</b>	<b>COMMUNICATE ELECTRONICALLY</b>	<b>139</b>



## **THHGCT04A**

# **Participate in co-operative online marketing initiatives for the tourism industry**

### **Unit Descriptor**

This unit deals with the skills and knowledge required to evaluate online co-operative tourism marketing initiatives, to provide appropriate website content and to update this content using remote authoring skills. As such it requires a general knowledge of online marketing initiatives in the tourism industry, and the basic technical skills which allow business operators to participate effectively in these initiatives. Technical protocols for participation will vary, and this unit must therefore be tailored to meet the needs of local industry when training is developed.

<b>Element</b>	<b>Performance Criteria</b>
<b>1 Evaluate online co-operative marketing initiatives</b>	<p>1.1 Source and evaluate relevant information about the range of current online co-operative tourism marketing initiatives in terms of potential value to the business.</p> <p>1.2 Evaluate additional skills, equipment or other resources that may be required to participate in the initiative.</p> <p>1.3 Assess the value of participation through consideration of overall marketing direction and any budgetary constraints.</p>
<b>2 Provide online content in appropriate format and style</b>	<p>2.1 Review and accurately interpret content requirements as set down by the administrator of the co-operative initiative.</p> <p>2.2 Use appropriate and customer-focussed writing techniques to develop content that is suited to an online environment and to the requirements of specific co-operative initiatives</p> <p>2.3 Identify appropriate images for inclusion in online content.</p> <p>2.4 Capture and manipulate digital images using appropriate techniques to enhance images.</p> <p>2.5 Upload content in accordance with relevant guidelines and protocols.</p>

- |   |   |
|---|---|
| <b>3 Use remote authoring to update content</b> | <p>3.1 Develop protocols to ensure regular and timely updating of content within co-operative sites.</p> <p>3.2 Update content accurately using remote authoring techniques in accordance with the requirements of the co-operative site.</p> |
|---|---|

## Range Statement

This unit applies to all tourism, hospitality and caravan enterprises that seek to market products and services in a co-operative online environment.

The following explanations identify how this unit may be applied in different workplaces and circumstances.

Co-operative marketing initiatives may be established and run by:

- national tourism organisations
- state tourism organisations
- regional tourism organisations
- local tourism organisations
- industry associations
- private organisations.

Co-operative marketing initiatives and sites may relate to:

- information only
- bookings and reservations
- referral services
- destination based sites
- product based sites (eg bed and breakfasts).

Relevant information about the range of current online co-operative tourism marketing initiatives may be sourced from:

- national, state, regional or local tourism organisations
- private organisations
- promotional materials provided to the business
- Internet.

Content requirements for co-operative sites may include:

- number of words
- number and size of digital images/multimedia
- order of information
- links to other sites and e-mail links
- conformity with style guides
- proximity to data/geo-coding
- pricing by room/package.

Protocols to ensure regular and timely updating of content may include:

- timetable for updating of words and images
- allocation of updating responsibility to specific staff member
- changes in pricing and release of special offers

- monitoring of system-generated emails.

Remote authoring techniques may include:

- those set down by a particular site administrator
- use of specific software programs as defined by site administrator, for example, those which assist in the development of digital images.

## **Evidence Guide**

### **Essential Knowledge and Skills to be Assessed**

Knowledge of and skills in the following areas must be assessed as part of this unit:

- the range of online co-operative marketing opportunities available to the tourism industry in Australia
- current national, state and regional frameworks for online co-operative marketing (eg Australian Tourism Data Warehouse, other government initiatives)
- specific online co-operative marketing initiatives for particular industry sectors
- guidelines and requirements for the format and style of typical online copy
- equipment and software requirements and techniques for the capturing, manipulation and uploading of digital images to co-operative+ sites including saving and storage of images
- remote authoring processes and techniques as appropriate to one or more co-operative initiatives as defined by the site administrator.

### **Linkages to Other Units**

This unit has strong linkages to a range of marketing and e-business units and combined training and assessment may be appropriate.

### **Critical Aspects of Assessment**

Evidence of the following is critical:

- knowledge of current developments and initiatives in relation to online co-operative marketing in the Australian tourism industry.
- awareness of and ability to use basic technical skills to create, upload and update content including both words and images.

### **Context of Assessment and Resource Implications**

Assessment must ensure:

- demonstration of skills using industry current equipment to develop and update online content in a co-operative marketing context.

### **Assessment Methods**

Assessment methods must be chosen to ensure that the skills required to participate in online co-operative marketing initiatives can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- evaluation of content developed by the candidate
- oral or written questions to assess knowledge and awareness of potential online co-operative marketing initiatives for tourism operators within Australia
- evaluation of reports prepared by the candidate to compare different online co-operative marketing initiatives

- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

### Key Competencies in this Unit

Key competencies are built into all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform    Level 2 = Administer and Manage    Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	2	Assessing opportunities for online co-operative marketing
Communicating Ideas and Information	2	Writing content for website inclusion
Planning and Organising Activities	2	Scheduling regular content updates
Working with Others and in Teams	2	Liaising with site administrators on content requirements
Using Mathematical Ideas and Techniques	1	Calculating costs of participation in online co-operative marketing
Solving Problems	2	Adjusting content to make it more suitable for online delivery
Using Technology	2	Using software to capture and manipulate digital images

## **BSBEBUS501A      Evaluate e-business opportunities**

### **Unit Descriptor**

This unit deals covers evaluation of the impact of e-business for an industry sector, new opportunities or capabilities provided by the Internet, threats and opportunities related to e-business, and risk/obstacles to be overcome to take advantages of e-business opportunities. This unit is related to BSBEBUS601A Develop an e-business strategy. Consider co-assessment with BSBEBUS502A Evaluate e-business models and BSBEBUS503A Design an e-business.

<b>Element</b>	<b>Performance Criteria</b>
<b>1      Analyse the external e-business environment</b>	<ul style="list-style-type: none"><li>1.1      The extent of e-business and its applications are identified.</li><li>1.2      The current or likely effect of e-business on key sectors of the economy which impact on the business, is evaluated.</li><li>1.3      The impact of e-business in the business' industry sector is researched and evaluated.</li><li>1.4      A competitive analysis of existing and potential competitors and allies in e-business is undertaken.</li><li>1.5      The likely impact of embracing e-business solutions is estimated for the business using valid and reliable information sources.</li><li>1.6      The potential impact of foreign and domestic government legislation is evaluated.</li></ul>

- |   |  |
|---|--|
| <b>2 Analyse the business' capabilities in relation to e-business</b> | <ul style="list-style-type: none"><li>2.1 The business' existing resources and core competencies are evaluated to identify competitive advantage.</li><li>2.2 Value chain analysis is completed across the organisation to identify processes and relationships that may benefit from the adoption of e-business solutions.</li><li>2.3 Threats and opportunities for the business related to the introduction of e-business solutions are identified.</li><li>2.4 Implications for the value chain of adopting e-business solutions are assessed.</li><li>2.5 Risks and obstacles in implementing e-business solutions are evaluated and ways to deal with them identified.</li><li>2.6 Resource analysis is conducted to identify cost and revenue implications in developing opportunities.</li></ul>   |
| <b>3. Evaluate e-business opportunities</b>                           | <ul style="list-style-type: none"><li>3.1 New capabilities provided by the Internet and other forms of e-business are identified through research and consultation and possible changes to the business and its culture are evaluated.</li><li>3.2 New e-business opportunities are identified and evaluated in terms of their compatibility with business goals and direction and their likely contribution to the business.</li><li>3.3 Legal and ethical issues relating to e-business opportunities are identified and evaluated.</li><li>3.4 The impact of the international nature of e-business is evaluated for each business opportunity.</li><li>3.5 The viability of making changes to current operations to take advantage of e-business opportunities is determined through cost-benefit analysis.</li><li>3.6 Timeframes required for implementation are evaluated for e-business opportunities.</li></ul> |

### **Range Statement**

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:



Legislation, codes and national standards relevant to the workplace may include:

- award and enterprise agreements
- national, State/Territory legislative requirements especially in regard to OH&S
- industry codes of practice
- OECD International Guidelines for Consumer Protection in E-Commerce
- copyright laws
- defamation laws
- privacy legislation
- intellectual property, confidentiality requirements
- legal and regulatory policies affecting e-business
- Internet codes of practice.

E-business is:

- every type of business transaction in which the participants (ie suppliers, end users etc) prepare or transact business or conduct their trade in goods or services electronically (A definition of e-business in E-competent Australia, ANTA, May 2000).

Processes and relationships may include:

- organisation structures
- customer service
- delivery of core services
- delivery of products
- delivery of Government services
- trading communities
- development of new products, services and markets.

Value chain analysis is:

- an analysis of a series of primary activities, such as:
  - inbound logistics
  - operations
  - outbound logistics
  - marketing and sales
  - service support
- and their support activities, such as:
  - business infrastructure
  - human resource management
  - technological development
  - procurement.

Threats and opportunities may include:

- business-to-business (B2B) opportunities where e-business is conducted between companies
- business-to-consumer (B2C) opportunities where e-business is conducted between an enterprise and a customer
- business to Government (B2G) opportunities where e-business is conducted between an enterprise and the government
- disintermediation threats/opportunities where the role of 'middlemen' or other middle supply chain elements is reduced or made redundant as newer more efficient supply chain technologies are implemented

- re-intermediation opportunities, where e-business creates new value between producers and consumers
- Competition legislation
- internal business opportunities that improve productivity utilising e-business development
- risk management: payments, fraud etc
- infrastructure requirements: disaster recovery, failsafe systems.

New capabilities may include:

- 24-hour operation
- communication
- global reach
- supply channel
- distribution channel
- online customer service
- automated marketing efforts.

Contribution to the business may include effect on:

- sales
- market share
- profitability
- growth
- return on investment
- customer satisfaction ratings
- staff productivity and professional development
- staff morale ie using efficient technologies to enhance workplace.

International nature of e-business may include:

- language
- culture
- legal issues
- technology
- distribution factors.

Technology focus of e-business may include:

- access to support
- basic understanding of processes.

## **Evidence Guide**

The Evidence Guide identifies the critical aspects, underpinning knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

### **Essential Knowledge and Skills to Be Assessed**

Knowledge and skills in the following areas must be assessed as part of this unit:

- relevant legislation from all levels of government that affects business operation, especially in regard to OH&S and environmental issues, equal opportunity, industrial relations and anti-discrimination
- familiarity with Internet/World Wide Web
- e-business environment
- e-business terminology

- sources of market information
- value chain analysis
- cost-benefit analysis
- computer operating skills
- literacy skills to identify and interpret market information
- numeracy skills for data analysis and cost-benefit analysis
- ability to relate to stakeholders from a range of social, cultural and ethnic backgrounds and physical and mental abilities.

### **Linkages to Other Units**

This unit has linkages to the following unit/s and combined training and assessment may be appropriate:

- BSBEBUS601A Develop an e-business strategy
- BSBEBUS502A Evaluate e-business models
- BSBEBUS503A Design an e-business.

### **Critical Aspects of Assessment**

Evidence of the following is critical:

- integrated demonstration of all elements of competency and their performance criteria
- evaluation of e-business opportunities involving new business models not simply electronic versions of existing businesses.

### **Context of Assessment and Resource Implications**

Assessment must ensure:

- competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- assessment takes account of the endorsed assessment guidelines in the Business Services Training Package
- assessment of performance requirements in this unit is undertaken in an actual workplace or simulated environment
- assessment reinforces the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit
- the learner and trainer have access to appropriate documentation and resources normally used in the workplace
- in order to achieve consistency of performance, evidence is be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations.

### **Assessment Methods**

Assessment methods must be chosen to ensure that repair or servicing of a chassis can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- project to evaluate e-business opportunities for a particular enterprise including evaluation of threats, costs and benefits
- oral or written questions to assess knowledge and awareness of e-business opportunities and capabilities and sources of information on these

- evaluation of reports prepared by the candidate to compare different online business usage
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

### Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform Level 2 = Administer and Manage Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	3	Analysing the e-business market and determining the impact of e-business solutions
Communicating Ideas and Information	3	Identifying and communicating e-business opportunities and objectives Identifying and encouraging business enabled by new capabilities which may become available
Planning and Organising Activities	3	Analysing the current external environment Evaluating the business's current capabilities Identifying new business opportunities
Working with Others and in Teams	3	Providing effective leadership and direction Facilitating change in order to take advantage of new business opportunities
Using Mathematical Ideas and Techniques	2	Conducting an analysis of current and future business opportunities in relation to the current business position
Solving Problems	3	Evaluating the current situation Positioning the business to take advantage of new business opportunities
Using Technology	2	Facilitating analysis Evaluating current situation and future opportunities

## BSBEBUS502A      Evaluate e-business models

### Unit Descriptor

This unit covers evaluating different e-business models such as e-shop, e-mail, e-brokerage, e-procurement, e-auction, collaboration partners, etc

This unit is related to BSBEBUS601A Develop an e-business strategy. Consider co-assessment with BSBEBUS501A Evaluate e-business opportunities and BSBEBUS503A Design an e-business.

Element	Performance Criteria
<b>1      Investigate e-business models</b>	1.1      Business-to-business, business-to-consumer and intra-organisational e-business applications are identified and analysed.
	1.2      e-business models are identified and their features distinguished.
	1.3      The structure and features of each business model are evaluated for their relevance within the industry and for the business.
<b>2      Evaluate e-business models</b>	2.1      The strengths and weaknesses of e-business models are identified in relation to the business.
	2.2      The resourcing, technical and security requirements of each model are identified and compared with current business capability.
	2.3      Compatible e-business models are ranked in terms of their viability and likely success.
	2.4      An e-business model is determined for the business in accordance with the requirements of its business plan.

### Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variable may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace may include:

- award and enterprise agreements
- national, State/Territory legislative requirements especially in regard to OH&S
- industry codes of practice
- OECD International Guidelines for Consumer Protection in E-Commerce

- copyright laws
- privacy legislation
- intellectual property, confidentiality requirements
- legal and regulatory policies affecting e-business
- Internet codes of practice.

Business-to-business (B2B):

- involves e-business between organisations
- may be B2G - business to government.

Business-to-consumer (B2C):

- involves e-business between an enterprise and a customer.

e-business is:

- every type of business transaction in which the participants (ie suppliers, end users etc) prepare or transact business or conduct their trade in goods or services electronically (Definition of e-commerce in E-competent Australia, ANTA, May 2000).

e-business models may include:

- e-shop/e-tailing
- e-mail
- e-procurement
- e-auction
- e-office
- virtual community
- portal
- collaboration partners
- third party marketplaces
- value chain integrators
- value chain service providers
- information brokers
- trust services
- competitor cooperation model
- web rings
- multilevel marketing
- aggregator models
- tender services
- e-government
- micro-payments business model.

## **Evidence Guide**

### **Essential Knowledge and Skills to Be Assessed**

Knowledge and skills in the following areas must be assessed as part of this unit:

- Relevant legislation from all levels of government that affects business operation, especially in regard to OH&S and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Internet/World Wide Web
- e-business
- e-business terminology

- accepted and emerging e-business models for business-to-business and business-to-consumer
- opportunities and threats for the business related to e-business
- electronic technology (computer, modem, telephone etc) skills
- literacy skills to identify and interpret business models
- numeracy skills for analysis of resourcing requirements and viability
- ability to relate to stakeholders from a range of social, cultural and ethnic backgrounds and physical and mental abilities.

### **Linkages to Other Units**

This unit has linkages to the following unit/s and combined training and assessment may be appropriate:

- BSBEBUS601A Develop an e-business strategy
- BSBEBUS501A Evaluate e-business opportunities
- BSBEBUS503A Design an e-business

### **Critical Aspects of Assessment**

Evidence of the following is critical:

- integrated demonstration of all elements of competency and their performance criteria
- rational and supporting evidence for choice of e-business model.

### **Context of Assessment and Resource Implications**

Assessment must ensure:

- competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- assessment takes account of the endorsed assessment guidelines in the Business Services Training Package
- assessment of performance requirements in this unit is undertaken in an actual workplace or simulated environment
- the learner and trainer have access to appropriate documentation and resources normally used in the workplace especially technology based resources
- in order to achieve consistency of performance, evidence is collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations.

### **Assessment Methods**

Assessment methods must be chosen to ensure that repair or servicing of a chassis can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- project to investigate and evaluate e-business models for a particular enterprise taking into consideration strengths and weaknesses and applicability to a specific enterprise
- oral or written questions to assess knowledge and awareness of e-business models and sources of information on these
- evaluation of reports prepared by the candidate to compare different online business models, including business-to-business and business-to-customer
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

**Key Competencies in this Unit**

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform Level 2 = Administer and Manage Level 3 = Design and Evaluate

<b>Key Competencies</b>	<b>Level</b>	<b>Examples</b>
Collecting, Organising and Analysing Information	3	Identifying and evaluating e-business models and their relevance for the business
Communicating Ideas and Information	3	Assisting planning through ranked business models
Planning and Organising Activities	3	Evaluating the structure and features of a variety of business models in order to develop an e-business model for the business
Working with Others and in Teams	3	Gathering and analysing information on business models
Using Mathematical Ideas and Techniques	2	Ranking compatible business models
Solving Problems	3	Evaluating and determining viable business models Developing an e-business model for the business which will provide a secure environment for business growth
Using Technology	1	Investigating e-business models



## **BSBEBUS603A      Evaluate new technologies for business**

### **Unit Descriptor**

This unit covers identification of new technologies and evaluation of their suitability to the business.

Consider co-assessment with BSBEBUS605A Identify and implement e-business innovation.

<b>Element</b>	<b>Performance Criteria</b>
<b>1      Investigate new technologies for business</b>	<p>1.1      Capabilities provided by new technologies are identified through research and consultation and their relevance to the business identified.</p> <p>1.2      Changes needed to the business and its culture to take advantage of new technologies are evaluated and costed.</p> <p>1.3      Likely capital expenditure and staff training required to implement new technologies are identified.</p>
<b>2      Evaluate the business's capabilities in relation to the use of new technologies</b>	<p>2.1      Existing technology and its level of use in the business evaluated.</p> <p>2.2      Value chain analysis is completed across the organisation to identify processes and relationships that may benefit from the adoption of new technologies.</p> <p>2.3      Risks and obstacles to utilising new technologies are evaluated and ways to deal with them identified.</p> <p>2.4      Requirements for integrating new technology with existing systems are determined.</p> <p>2.5      Budgetary and other resources available for the adoption of new technologies are identified in accordance with the organisation's business strategy.</p>

- |  |  |
|--|--|
| <b>3. Evaluate suitability of new technology solutions to the business</b> | <p>3.1 Capabilities provided by new technologies are compared with business requirements within given resource parameters and potentially suitable technology identified.</p> <p>3.2 Staff competencies for operating with new technologies are identified and staffing and/or training costs and lead times are determined.</p> <p>3.3 Cost/benefits analysis for new technologies is performed and suitable technologies recommended for acquisition in accordance with organisational requirements.</p> |
|--|--|

### Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace may include:

- award and enterprise agreement
- national, State/Territory legislative requirements especially in regard to OH&S
- OECD International Guidelines for Consumer Protection in E-Commerce
- copyright laws
- privacy legislation
- intellectual property, confidentiality requirements
- legal and regulatory policies affecting e-business.

Capabilities provided by new technologies may include:

- linking of email and/or Internet transactions into other (existing) computer systems
- services/applications that can be provided by mobile commerce
- permanent login to corporate networks – able to receive short message service (SMS) at any time
- 24 hour telephone connection (rather than connected at dial up) charged for data transmitted – packet based (voice packets) not time based
- access to information and information services, available anytime, anyplace and anywhere to anybody (wireless)
- fax over IP (Internet Protocol)
- voice over IP
- video streaming services over mobile phones
- improved security for data transmitted by wireless technology.

New technologies may include:

- mobile technologies eg second generation such as GSM (Global System for Mobile communications)
- 3G (third generation cellular radio for mobile technology, designed to support wideband data communications just as well as voice – the basis for a wireless information society)
- location based services for mobile

- digital signature technology for mobile phone users
- General Packet Radio Services (GPRS)
- WAP (wireless application protocol)
- UMTS (universal mobile telephony system)
- XDSL technologies eg ADSL (Asymmetric Digital Subscriber Line)
- computer telephony integration
- access gateways (to hide type of access that may be via cable modem, mobile telephone, landline, ADSL modem)
- fax gateways
- Bluetooth chips for short distance wireless connections over short distances (alternative to cable)
- EDGE (Enhanced Data rates for GSM Evolution) to increase GSM network capacity and data rates
- Internet telephony
- voice verification technology
- business to business electronic data transfer via Internet, web browsers using XML.

## **Evidence Guide**

### **Essential Knowledge and Skills to Be Assessed**

Knowledge and skills in the following areas must be assessed as part of this unit:

- relevant legislation from all levels of government that affects business operation, especially in regard to OH&S and environment issues, equal opportunity, industrial relations and anti-discrimination
- reliable sources of information on cutting edge (but not unproven) technology
- value chain analysis
- cost/benefit analysis
- literacy skills to research information on new technologies
- numeracy skills to conduct cost/benefit analysis
- computer technology skills
- ability to relate to stakeholders from a range of social, cultural and ethnic backgrounds and physical and mental abilities.

### **Linkages to Other Units**

This unit has linkages to the following unit/s and combined training and assessment may be appropriate:

- BSBEBUS605A Identify and implement e-business innovation.

### **Critical Aspects of Assessment**

Evidence of the following is critical:

- integrated demonstration of all elements of competency and their performance criteria
- rationale for new technology recommendations.

### **Context of Assessment and Resource Implications**

Assessment must ensure:

- competency is demonstrated by performance of all state criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence guide, and within the scope as defined by the Range Statement
- assessment takes account of the endorsed assessment guidelines in the Business Services Training Package

- assessment of performance requirements in this unit is undertaken in an actual workplace or simulated environment
- assessment reinforces the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit.
- the learner and trainer have access to appropriate documentation and resources normally used in the workplace
- in order to achieve consistency of performance, evidence is collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations.

### Assessment Methods

Assessment methods must be chosen to ensure that repair or servicing of a chassis can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- project to research and evaluate new e-business technologies for a particular enterprise including evaluation of suitability, advantages and disadvantages and capabilities of the enterprise
- oral or written questions to assess knowledge and awareness of e-business technologies and sources of information on these
- evaluation of reports prepared by the candidate to cost/benefit and value chain analysis on particular technologies
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

### Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform Level 2 = Administer and Manage Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	3	Investigating capabilities provided by new technologies
Communicating Ideas and Information	3	Recommending acquisition of new technologies
Planning and Organising Activities	3	Implementing new technologies
Working with Others and in Teams	3	Identifying staffing or staff training requirements for implementation of new technology
Using Mathematical Ideas and Techniques	2	Conducting cost/benefit analysis
Solving Problems	3	Evaluating new technologies
Using Technology	2	Researching new technologies

## **BSBEBUS601A      Develop an e-business strategy**

### **Unit Descriptor**

This unit covers environmental analysis and strategic planning for e-business that supports the organisation's overall business strategy.

This unit is related to BSBEBUS501A Evaluate e-business opportunities and BSBEBUS502A Evaluate e-business models. Consider co-assessment with BSBEBUS602 Develop an action plan for an e-business strategy and BSBEBUS604A Develop a business website.

<b>Element</b>	<b>Performance Criteria</b>												
<b>1      Analyse the organisation's internal business environment</b>	<table><tr><td>1.1</td><td>The organisation's strategic direction, general business goals and priorities are confirmed and potential benefits from the adoption of an e-business strategy are identified.</td></tr><tr><td>1.2</td><td>Current business practices, responsibilities, and business culture are re-evaluated in light of e-business requirements.</td></tr><tr><td>1.3</td><td>Organisational policies, procedures and relationships that may benefit from the adoption of e-business solutions.</td></tr><tr><td>1.4</td><td>The impact of e-business strategies on employees and existing customers is evaluated and documented in accordance with organisation requirements.</td></tr><tr><td>1.5</td><td>The business' strengths, weakness, opportunities and threats are analysed in relation to e-business.</td></tr><tr><td>1.6</td><td>The potential for the e-business strategy to transform the business is considered within the planning process and risk management processes identified.</td></tr></table>	1.1	The organisation's strategic direction, general business goals and priorities are confirmed and potential benefits from the adoption of an e-business strategy are identified.	1.2	Current business practices, responsibilities, and business culture are re-evaluated in light of e-business requirements.	1.3	Organisational policies, procedures and relationships that may benefit from the adoption of e-business solutions.	1.4	The impact of e-business strategies on employees and existing customers is evaluated and documented in accordance with organisation requirements.	1.5	The business' strengths, weakness, opportunities and threats are analysed in relation to e-business.	1.6	The potential for the e-business strategy to transform the business is considered within the planning process and risk management processes identified.
1.1	The organisation's strategic direction, general business goals and priorities are confirmed and potential benefits from the adoption of an e-business strategy are identified.												
1.2	Current business practices, responsibilities, and business culture are re-evaluated in light of e-business requirements.												
1.3	Organisational policies, procedures and relationships that may benefit from the adoption of e-business solutions.												
1.4	The impact of e-business strategies on employees and existing customers is evaluated and documented in accordance with organisation requirements.												
1.5	The business' strengths, weakness, opportunities and threats are analysed in relation to e-business.												
1.6	The potential for the e-business strategy to transform the business is considered within the planning process and risk management processes identified.												

- |           |  |     |   |
|-----------|--|-----|---|
| <b>2</b>  | <b>Evaluate external factors impacting on e-business strategy</b>                  | 2.1 | The impact of e-business in the organisation's industry sector is researched and evaluated.   |
|           |  | 2.2 | Legal, ethical and security issues relating to e-business are identified and analysed.  |
|           |  | 2.3 | A competitive analysis of existing and potential e-business competitors and allies in is undertaken to determine the relative competitive advantage of e-business strategies. |
|           |  | 2.4 | The impact on the strategy of the potential international nature of e-business is evaluated.  |
|           |  | 2.5 | Potential e-business models are evaluated in terms of their ability to satisfy business objectives and an economic evaluation of each option completed.                       |
|           |  | 2.6 | Opportunities, risks and obstacles in implementing an e-business model are evaluated and ways to deal with them identified.   |
| <b>3.</b> |  |     |   |
|           | <b>Determine the strategic direction of the business in relation to e-business</b> | 3.1 | Strategic e-business goals are determined for the business in accordance with the overall strategic direction and business goals of the organisation.                         |
|           |  | 3.2 | Critical e-business success factors are determined in accordance with the overall business goals of the organisation.   |
|           |  | 3.3 | Key result areas for the e-business strategy are identified in accordance with overall business goals.  |
|           |  | 3.4 | The strategy identifies areas of the business that are trading online and off-line and the management of these, including operations that may overlap.                        |

- |  |   |     |   |     |   |     |  |     |   |     |  |     |  |
|--|---|-----|---|-----|---|-----|--|-----|---|-----|--|-----|--|
| <b>4. Formulate an e-business strategy</b> | <table border="0"><tr><td style="vertical-align: top; padding-right: 20px;">4.1</td><td>The e-business strategy identifies prioritised objectives within key results areas and includes strategies to achieve each objective in accordance with overall strategic direction and business goals.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">4.2</td><td>The strategy identifies an e-business model for the organisation in accordance with strategic direction and overall business objectives and capabilities.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">4.3</td><td>The strategy includes a risk analysis for key result areas, and strategies for dealing with culture change in the organisation relating to e-business.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">4.4</td><td>Policies and procedures are identified for development to guide business operation in accordance with the e-business model and overall business objectives.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">4.5</td><td>Valid and reliable performance measures are determined for each e-business objective along with strategies for performance monitoring and reporting.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">4.6</td><td>The strategy meets organisational requirements in terms of format and level of detail.</td></tr></table> | 4.1 | The e-business strategy identifies prioritised objectives within key results areas and includes strategies to achieve each objective in accordance with overall strategic direction and business goals. | 4.2 | The strategy identifies an e-business model for the organisation in accordance with strategic direction and overall business objectives and capabilities. | 4.3 | The strategy includes a risk analysis for key result areas, and strategies for dealing with culture change in the organisation relating to e-business. | 4.4 | Policies and procedures are identified for development to guide business operation in accordance with the e-business model and overall business objectives. | 4.5 | Valid and reliable performance measures are determined for each e-business objective along with strategies for performance monitoring and reporting. | 4.6 | The strategy meets organisational requirements in terms of format and level of detail. |
| 4.1  | The e-business strategy identifies prioritised objectives within key results areas and includes strategies to achieve each objective in accordance with overall strategic direction and business goals.   |     |   |     |   |     |  |     |   |     |  |     |  |
| 4.2  | The strategy identifies an e-business model for the organisation in accordance with strategic direction and overall business objectives and capabilities.   |     |   |     |   |     |  |     |   |     |  |     |  |
| 4.3  | The strategy includes a risk analysis for key result areas, and strategies for dealing with culture change in the organisation relating to e-business.  |     |   |     |   |     |  |     |   |     |  |     |  |
| 4.4  | Policies and procedures are identified for development to guide business operation in accordance with the e-business model and overall business objectives.   |     |   |     |   |     |  |     |   |     |  |     |  |
| 4.5  | Valid and reliable performance measures are determined for each e-business objective along with strategies for performance monitoring and reporting.  |     |   |     |   |     |  |     |   |     |  |     |  |
| 4.6  | The strategy meets organisational requirements in terms of format and level of detail.  |     |   |     |   |     |  |     |   |     |  |     |  |

## Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace may include:

- award and enterprise agreements
- national, State/Territory legislative requirements especially in regards to OH&S
- industry codes of practice
- OECD International Guidelines for Consumer Protection in E-Commerce
- copyright laws
- defamation laws
- privacy legislation
- intellectual property, confidentiality requirements
- legal and regulatory policies affecting e-business.

e-business is:

- every type of business transaction in which the participants (ie suppliers, end users etc) prepare or transact business or conduct their trade in goods or services electronically (Definition of e-commerce in E-competent Australia, ANTA, May 2000).

Procedures and relationships may include:

- organisation structures, plans, strategies
- customer service
- delivery of core services
- delivery of products

- delivery of wider business services
- delivery of Government services
- trading communities
- development of new products, services and markets
- human resource development.

Threats and opportunities may include:

- business-to-business (B2B) opportunities involving e-business between two companies
- business-to-consumer (B2C) opportunities involving e-business between an enterprise and a customer
- disintermediation threats/opportunities where the role of ‘middlemen’ or other middle supply chain elements is reduced or made redundant as newer more efficient supply chain technologies are implemented
- re-intermediation opportunities, where e-business creates new value between producers and consumers
- rate of change of market
- acceptance of the community to validity of e-business
- threats to the reliability of supply in the provision of goods and services from suppliers outside the enterprise.

Legal and ethical issues may include:

- security
- privacy
- confidentiality
- ownership of information
- intellectual property
- fraud prevention and detection
- business ethics
- legal issue eg jurisdiction, contract validity, taxation
- OH&S.

International nature of e-business may include:

- language
- culture
- legal issues
- technology.

Policies and procedures may include:

- security
- privacy
- information management
- risk management
- intellectual property
- fraud prevention and detection
- code of practice
- business ethics
- human resource management
- human resource development
- performance management
- electronic communication
- outsourcing



- legal issues eg jurisdiction, contract validity, taxation
- quality assurance and warranty
- cultural communication aspects eg forms of address, expression, site navigation assistance, client feedback.

## **Evidence Guide**

The Evidence Guide identifies the critical aspects, underpinning knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

### **Essential Knowledge and Skills to Be Assessed**

Knowledge and skills in the following areas must be assessed as part of this unit:

- relevant legislation from all levels of government that affects business operation, especially in regard to OH&S and environmental issues, equal opportunity, industrial relations and anti-discrimination
- e-business environment
- e-business terminology
- business planning methodologies
- legal, ethical and security issues relating to e-business
- culture of e-business versus traditional business models
- intellectual property laws
- computer technology skills
- literacy skills to research and develop e-business strategy
- numeracy skills for data analysis
- risk analysis
- business development skills commensurate with understanding the business' marketing needs
- ability to relate to stakeholders from a range of social, cultural and ethnic backgrounds and physical and mental abilities.

### **Linkages to Other Units**

This unit has linkages to the following unit/s and combined training and assessment may be appropriate:

- BSBEBUS501A Evaluate e-business opportunities
- BSBEBUS502A Evaluate e-business models
- BSBEBUS602 Develop an action plan for an e-business strategy
- BSBEBUS604A Develop a business website

### **Critical Aspects of Assessment**

Evidence of the following is critical:

- integrated demonstration of all elements of competency and their performance criteria
- information to support choice of critical success factors, key result areas, strategic objectives and their priorities.

### **Context of Assessment and Resource Implications**

Assessment must ensure:

- competency is demonstrated by performance of all state criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence guide, and within the scope as defined by the Range Statement

- assessment takes account of the endorsed assessment guidelines in the Business Services Training Package
- assessment of performance requirements in this unit is undertaken in an actual workplace or simulated environment
- assessment reinforces the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit.
- the learner and trainer have access to appropriate documentation and resources normally used in the workplace
- in order to achieve consistency of performance, evidence is collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations.

### Assessment Methods

Assessment methods must be chosen to ensure that repair or servicing of a chassis can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- project to develop an e-business strategy for a particular enterprise taking into consideration enterprise policies, procedures and relationships and technical capability
- oral or written questions to assess knowledge of external factors, external factors affecting the enterprise and legal, ethical and security issues which may impact on the strategy
- evaluation of report prepared by the candidate to evaluate the strategic direction of the enterprise in relation to the e-business strategy
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

### Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform Level 2 = Administer and Manage Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	3	Designing and developing an e-business strategy
Communicating Ideas and Information	3	Creating a clear strategy document
Planning and Organising Activities	3	Identifying critical success factors and key result areas
Working with Others and in Teams	3	Determining priorities
Using Mathematical Ideas and Techniques	2	Analysing data
Solving Problems	3	Analysing risk
Using Technology	2	Preparing strategy document

## **BSBEBUS602A      Develop an action plan for an e-business strategy**

### **Unit Descriptor**

This unit covers development of an action plan or operational plan for the implementation and management of an e-business strategy.

Consider co-assessment with BSBEBUS601A Develop an e-business strategy.

<b>Element</b>	<b>Performance Criteria</b>
<b>1      Identify parameters for action plan</b>	<div><div>1.1</div><div>The structure and format of the plan and resources for strategy implementation are confirmed in accordance with organisational requirements.</div></div> <div><div>1.2</div><div><i>e-business</i> strategy is analysed to confirm strategic direction, critical success factors and key result areas.</div></div> <div><div>1.3</div><div>Pre-planning data such as available resources, budget allocations, timeframes and milestones are confirmed for the operating cycle of the e-business strategy.</div></div> <div><div>1.4</div><div><i>Legal, ethical and security issues</i> relating to e-business are clarified.</div></div> <div><div>1.5</div><div>The impact of e-business trading is factored into operational policies where not all business will be conducted online.</div></div>

- |   |   |     |  |     |  |     |  |     |  |     |  |     |   |
|---|---|-----|--|-----|--|-----|--|-----|--|-----|--|-----|---|
| <b>2      Identify tactical objectives and activities for action plan</b> | <table border="0"><tr><td style="vertical-align: top; padding-right: 20px;">2.1</td><td><i>Tactical objectives</i> are linked directly to critical success factors and strategic objectives for each key result area in the e-business strategy.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">2.2</td><td>Tactical objectives include those that address contextual issues such as the e-business model of the organisation, OH&amp;S issues for e-business and the national/international nature of e-business.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">2.3</td><td>Activities are identified and prioritised and responsibilities are assigned in accordance with organisational requirements.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">2.4</td><td>Activities relate to both business activities and those that address risks and obstacles related to e-business.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">2.5</td><td>Timeframes, resource implications and budgetary requirements are identified for each activity in accordance with pre-planning information.</td></tr></table>  | 2.1 | <i>Tactical objectives</i> are linked directly to critical success factors and strategic objectives for each key result area in the e-business strategy. | 2.2 | Tactical objectives include those that address contextual issues such as the e-business model of the organisation, OH&S issues for e-business and the national/international nature of e-business. | 2.3 | Activities are identified and prioritised and responsibilities are assigned in accordance with organisational requirements.                | 2.4 | Activities relate to both business activities and those that address risks and obstacles related to e-business.  | 2.5 | Timeframes, resource implications and budgetary requirements are identified for each activity in accordance with pre-planning information. |     |   |
| 2.1   | <i>Tactical objectives</i> are linked directly to critical success factors and strategic objectives for each key result area in the e-business strategy.  |     |  |     |  |     |  |     |  |     |  |     |   |
| 2.2   | Tactical objectives include those that address contextual issues such as the e-business model of the organisation, OH&S issues for e-business and the national/international nature of e-business.  |     |  |     |  |     |  |     |  |     |  |     |   |
| 2.3   | Activities are identified and prioritised and responsibilities are assigned in accordance with organisational requirements.   |     |  |     |  |     |  |     |  |     |  |     |   |
| 2.4   | Activities relate to both business activities and those that address risks and obstacles related to e-business.   |     |  |     |  |     |  |     |  |     |  |     |   |
| 2.5   | Timeframes, resource implications and budgetary requirements are identified for each activity in accordance with pre-planning information.  |     |  |     |  |     |  |     |  |     |  |     |   |
| <b>3.      Formulate an action plan for an e-business strategy</b>        | <table border="0"><tr><td style="vertical-align: top; padding-right: 20px;">3.1</td><td>Outcomes, success measures, monitoring and reporting processes are included in the plan for each tactical objective and are valid and relevant.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">3.2</td><td>The action plan identifies learning and development needs and systems, change management and implementation strategies to assist in achieving the e-business strategy.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">3.3</td><td><i>Policies and procedures</i> are scheduled for development/updating to guide business operation in accordance with the e-business model.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">3.4</td><td>The action plan provides <i>information</i> and strategies in reader friendly language or diagrammatic format to ensure ease of use by the organisation.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">3.5</td><td>The action plan is formulated in accordance with organisational requirements for content, structure and format.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">3.6</td><td>The action plan includes monitoring and review processes to assess outcomes and identify and address shortfalls in accordance with organisational requirements.</td></tr></table> | 3.1 | Outcomes, success measures, monitoring and reporting processes are included in the plan for each tactical objective and are valid and relevant.          | 3.2 | The action plan identifies learning and development needs and systems, change management and implementation strategies to assist in achieving the e-business strategy.                             | 3.3 | <i>Policies and procedures</i> are scheduled for development/updating to guide business operation in accordance with the e-business model. | 3.4 | The action plan provides <i>information</i> and strategies in reader friendly language or diagrammatic format to ensure ease of use by the organisation. | 3.5 | The action plan is formulated in accordance with organisational requirements for content, structure and format.                            | 3.6 | The action plan includes monitoring and review processes to assess outcomes and identify and address shortfalls in accordance with organisational requirements. |
| 3.1   | Outcomes, success measures, monitoring and reporting processes are included in the plan for each tactical objective and are valid and relevant.   |     |  |     |  |     |  |     |  |     |  |     |   |
| 3.2   | The action plan identifies learning and development needs and systems, change management and implementation strategies to assist in achieving the e-business strategy.  |     |  |     |  |     |  |     |  |     |  |     |   |
| 3.3   | <i>Policies and procedures</i> are scheduled for development/updating to guide business operation in accordance with the e-business model.  |     |  |     |  |     |  |     |  |     |  |     |   |
| 3.4   | The action plan provides <i>information</i> and strategies in reader friendly language or diagrammatic format to ensure ease of use by the organisation.  |     |  |     |  |     |  |     |  |     |  |     |   |
| 3.5   | The action plan is formulated in accordance with organisational requirements for content, structure and format.   |     |  |     |  |     |  |     |  |     |  |     |   |
| 3.6   | The action plan includes monitoring and review processes to assess outcomes and identify and address shortfalls in accordance with organisational requirements.   |     |  |     |  |     |  |     |  |     |  |     |   |

## Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the

unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace may include:

- award and enterprise agreements
- national, State/Territory legislative requirements especially in regard to OH&S
- intellectual property, confidentiality requirements
- legal and regulatory policies affecting e-business
- business ethics
- and must include:
- industry codes of practice
- OECD International Guidelines for Consumer Protection in E-Commerce
- copyright laws
- privacy legislation.

e-business is:

- every type of business transaction in which the participants (ie suppliers, end users etc) prepare or transact business or conduct their trade in goods or services electronically (Definition of e-commerce in E-competent Australia, ANTA, May 2000).

Legal and ethical requirements may include:

- confidentiality
- codes of practice
- business ethics
- legislation
- regulations
- policies and guidelines.

Tactical objectives may include:

- links to strategic and operational objectives
- links to general business strategies.

Action plan information may include:

- objectives
- their link to the e-business strategy
- activities
- priorities
- responsibility
- timeframes
- resource implications
- budgetary implications
- success measures
- monitoring and evaluation processes
- reporting processes
- review processes
- change management strategies
- database construction and maintenance
- access to website under construction
- testing of website by client stakeholders.

Policies and guidelines may include:

- information management
- risk management
- intellectual property
- fraud prevention and detection
- business ethics
- code of practice
- human resource management
- performance management
- electronic communication
- outsourcing
- legal issues eg jurisdiction, contract validity, taxation
- OH&S
- and must include:
- security
- privacy
- confidentiality.

## **Evidence Guide**

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

## **Essential Knowledge and Skills to Be Assessed**

Knowledge and skills in the following areas must be assessed as part of this unit:

- relevant legislation from all levels of government that affects business operation, especially in regard to OH&S and environmental issues, equal opportunity, industrial relations and anti-discrimination
- e-business environment
- e-business terminology
- general business planning concepts
- strategic operational and tactical planning methodologies
- legal, ethical and security issues relating to e-business
- culture of e-business versus traditional business models
- implementation issues
- stakeholders in planning process
- computer technology skills including database administration
- literacy skills to research, develop and write e-business action plan
- numeracy skills for budgetary information
- communication skills for consultation to determine priorities
- policy development skills
- ability to relate to stakeholders from a range of social, cultural and ethnic backgrounds and physical and mental abilities.

## **Linkages to Other Units**

This unit has linkages to the following unit/s and combined training and assessment may be appropriate:

- BSBEBUS601A Develop an e-business strategy

## **Critical Aspects of Assessment**

Evidence of the following is critical:

- integrated demonstration of all elements of competency and their performance criteria
- scope of the objectives and activities for e-business
- knowledge of e-business and e-business implementation issues.

### Context of Assessment and Resource Implications

Assessment must ensure:

- competency is demonstrated by performance of all state criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence guide, and within the scope as defined by the Range Statement
- assessment takes account of the endorsed assessment guidelines in the Business Services Training Package
- assessment of performance requirements in this unit is undertaken in an actual workplace or simulated environment
- assessment reinforces the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit.
- the learner and trainer have access to appropriate documentation and resources normally used in the workplace
- in order to achieve consistency of performance, evidence is collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations.

### Assessment Methods

Assessment methods must be chosen to ensure that repair or servicing of a chassis can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- project to develop an action plan to develop an action plan to implement the e-business strategy for an enterprise, including tactical options, consideration of organisational constraints, monitoring strategy and measures
- oral or written questions on legal, ethical and security issues and copyright issues which may impact on the action plan
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

### Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform Level 2 = Administer and Manage Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	3	Confirming pre-planning information
Communicating Ideas and Information	3	Creating a reader friendly action plan document
Planning and Organising Activities	3	Preparing action plan

Working with Others and in Teams	3	Determining priorities and responsibilities for activities
Using Mathematical Ideas and Techniques	2	Estimating budgetary requirements
Solving Problems	3	Balancing infrastructure Processing activities against direct income earning activities
Using Technology	1	Preparing action plan



## BSBEBUS504A      Implement an e-business strategy

### Unit Descriptor

This unit covers implementation, monitoring and review of e-business strategy.

This unit is related to BSBEBUS601A Develop an e-business strategy. Consider co-assessment with BSBEBUS505A Implement new technologies for business.

Element	Performance Criteria
<b>1      Implement action plan for e-business strategy</b>	<p>1.1      Business processes are identified and re-engineered using online technologies in accordance with the business plan and the e-business model.</p> <p>1.2      Technology for e-business implementation is acquired in accordance with the action plan and budgetary requirements.</p> <p>1.3      <i>Policies and procedures</i> are used to guide business operations in accordance with the e-business model.</p> <p>1.4      Learning and development opportunities are provided in accordance with the business plan and staff needs.</p> <p>1.5      <i>Information and development support</i> is provided to customers and supply chain to assist in implementation of the e-business strategy.</p>
<b>2      Manage the business change process</b>	<p>2.1      Coaching and mentoring is provided to assist staff, supply chain and customers to master new processes and new technologies in accordance with individual needs.</p> <p>2.2      Staff, supply chain and customers are kept informed of progress in the implementation of change to an e-business model.</p>

- |   |   |
|---|---|
| <b>3. Monitor implementation and manage contingencies</b> | <p>3.1 The culture of the business and its effect on achievement of business goals is monitored and processes for dealing with culture change are managed in accordance with the e-business strategy.</p> <p>3.2 Opportunities are identified to adjust policies and processes to respond to the changing needs of customers, supply chain and the organisation.</p> <p>3.3 Adjustments to manage contingencies are made in accordance with level of responsibility and authority.</p>  |
| <b>4. Evaluate and improve e-business strategy</b>        | <p>4.1 Review of the implementation of the e-business strategy is undertaken in accordance with organisational requirements.</p> <p>4.2 Information and reports are used to compare plans, budgets, timelines and forecasts to actual performance.</p> <p>4.3 e-business systems are reviewed in consultation with users and personnel responsible for e-business and recommendations made for improvements.</p> <p>4.4 Evaluation results and feedback from users are used to plan and improve future e-business strategies.</p> |

## Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace may include:

- award and enterprise agreements
- national, State/Territory legislative requirements especially in regard to OH&S
- industry codes of practice
- OECD International Guidelines for Consumer Protection in E-Commerce
- copyright laws
- defamation laws
- privacy legislation
- intellectual property, confidentiality requirements
- legal and regulatory policies affecting e-business.

e-business is:

- every type of business transaction in which the participants (ie suppliers, end users etc) prepare or transact business or conduct their trade in goods or services electronically (Definition of e-commerce in E-competent Australia, ANTA, May 2000).

Policies and guidelines may include:

- security
- privacy
- confidentiality
- information management
- risk management
- intellectual property
- fraud prevention and detection
- business ethics
- human resource management
- performance management
- electronic communication
- outsourcing
- legal issues eg jurisdiction, contract validity, taxation.

Information and development support may include:

- personal identification and password for online access to business processes eg purchasing or supply
- banking information for electronic funds transfer
- new protocols relating to legal or security issues for e-business
- open and international standards eg EAN.UCC or UN/EDIFACT
- contact person
- advice on staffing arrangements
- advice on technology issues/compatibility
- advice on existing business strategy and base business versus growth business
- feedback loops.

## **Evidence Guide**

The Evidence Guide identifies the critical aspects, underpinning knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

### **Essential Knowledge and Skills to Be Assessed**

Knowledge and skills in the following areas must be assessed as part of this unit:

- relevant legislation from all levels of government that affects business operation, especially in regard to OH&S and environmental issues, equal opportunity, industrial relations and anti-discrimination
- e-business environment
- e-business terminology
- legal, ethical and security issues relating to e-business
- culture of e-business versus traditional business models
- open and international standards
- implementation issues
- computer technology skills
- literacy skills to interpret policies and procedures and provide information to others
- numeracy skills for complying with budgetary requirements

- communication skills for consultation with users, supply chain and customers
- change management
- ability to relate to stakeholders from a range of social, cultural and ethnic backgrounds and physical and mental abilities.

### **Linkages to Other Units**

This unit has linkages to the following unit/s and combined training and assessment may be appropriate:

- BSBEBUS601A Develop an e-business strategy
- BSBEBUS505A Implement new technologies for business

### **Critical Aspects of Assessment**

Evidence of the following is critical:

- integrated demonstration of all elements of competency and their performance criteria
- demonstration of the importance of culture change for the successful implementation of an e-business strategy.

### **Context of Assessment and Resource Implications**

Assessment must ensure:

- competency is demonstrated by performance of all state criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence guide, and within the scope as defined by the Range Statement
- assessment takes account of the endorsed assessment guidelines in the Business Services Training Package
- assessment of performance requirements in this unit is undertaken in an actual workplace or simulated environment
- assessment reinforces the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit.
- the learner and trainer have access to appropriate documentation and resources normally used in the workplace
- in order to achieve consistency of performance, evidence is collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations.

### **Assessment Methods**

Assessment methods must be chosen to ensure that repair or servicing of a chassis can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- project to implement a-business strategy developed by the candidate for an enterprise
- oral or written questions to identify advantages and disadvantages of the e-business strategy, enterprise training needs and communication strategies with stakeholders
- evaluation of progress reports monitoring and evaluating the implementation process
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

### Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform Level 2 = Administer and Manage Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	3	Re-engineering business processes Evaluating and producing reports
Communicating Ideas and Information	3	Assisting and coaching staff, supply chain and customers with new e-business model Keeping stakeholders constantly informed of the changes in e-business strategies
Planning and Organising Activities	3	Developing policies and procedures to inform business operations Implementing e-business strategies
Working with Others and in Teams	3	Providing training and development Bringing about the culture change necessary to manage change Implementing effective e-business strategies
Using Mathematical Ideas and Techniques	1	Meeting budgetary requirements
Solving Problems	3	Managing change Dealing with contingencies Developing and adapting processes and procedures Implement e-business strategies
Using Technology	3	Providing business services

## BSBEBUS613A      Develop online customer service strategies

### Unit Descriptor

This unit covers investigating requirements for online customer service, development of policy and strategies for the delivery of customer services and monitoring and evaluation of policy implementation.

This unit relates to BSBEBUS408A Implement and monitor delivery of quality customer service online. Consider co-assessment with BSBEBUS614A Build online customer loyalty.

Element	Performance Criteria
<b>1      Determine customer service requirements for online products and services</b>	1.1 <i>Customer service requirements</i> are determined through market research and feedback from <i>customers</i> and staff on existing online customer service.
	1.2      A range of customer services available through other organisations are analysed and compared with current operations.
	1.3 <i>Customer service data</i> is captured online and analysed to identify levels of satisfaction and emerging trends.
<b>2      Develop a customer service policy for an e-business</b>	2.1      Customer service policy addresses security and privacy issues, customer service standards, product and service quality, and e-marketing standards.
	2.2      Customer service standards cover legal and ethical requirements, on and off-line communication protocols, pricing policy, conduct of business transactions and dealing with difficult situations/customers.
	2.3      The policy provides for the resolution of <i>customer difficulties and complaints</i> , including refund /replacement policies and guarantees.
	2.4      The policy integrates online customer service into business processes.

- |  |   |
|--|---|
| <b>3. Develop online customer service strategies</b> | <p>3.1 A strategy is <i>developed</i> to establish/build trust in the business by online customers by addressing concerns about security, privacy and confidentiality.</p> <p>3.2 Customers are provided with relevant, accurate and current online information regarding products, services, prices and warranties.</p> <p>3.3 Online customer feedback procedures are established in accordance with organisational requirements.</p> <p>3.4 On and off-line procedures are developed to resolve customer difficulties and complaints in accordance with organisational policy.</p> |
| <b>4. Evaluate online customer service</b>           | <p>4.1 Customer satisfaction with service delivery is evaluated using feedback data from customers and staff.</p> <p>4.2 Customer service is monitored against the standards and changes necessary to maintain or improve service are identified in accordance with organisational requirements.</p> <p>4.3 Online systems, records and reporting procedures are maintained to compare changes in customer satisfaction over time in accordance with organisational requirements.</p>   |

## Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace may include:

- award and enterprise agreements
- national, State/Territory legislative requirements especially in regard to OH&S
- industry codes of practice
- OECD International Guidelines for Consumer Protection in E-Commerce
- copyright laws
- defamation laws
- privacy legislation
- intellectual property, confidentiality requirements
- legal and regulatory policies affecting e-business.

e-business is:

- every type of business transaction in which the participants (ie suppliers, end users etc) prepare or transact business or conduct their trade in goods or services electronically (Definition of e-commerce in E-competent Australia, ANTA, May 2000).

Customer service requirements may include:

- advice or general information
- specific information
- further information
- complaints
- purchasing online products and services
- returning online products and services
- accuracy of information
- fairness
- promptness/politeness of response
- prices/value
- access to call centre.

Customer service data may include:

- website access history
- purchasing history
- transaction values
- promotion responses
- acquisition sources.

Customers may include:

- internal or external
- other agencies
- individual members of the organisation
- corporate customers
- individual members of the public.

Customer difficulties and complaints may include:

- difficulty accessing services
- customer dissatisfaction with service quality
- services not available
- unfriendly website design
- website faults
- inactive links
- time taken to access services
- administrative errors such as incorrect invoices or prices
- supply errors such as incorrect product delivered
- service errors
- delivery errors
- products not delivered on time
- damaged goods or goods not delivered
- software interface problems.

Strategy development may include:

- new strategies researched and developed from scratch
- adaptation of other organisation's policies.



## Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

### Essential Knowledge and Skills to Be Assessed

Knowledge and skills in the following areas must be assessed as part of this unit:

- relevant legislation from all levels of government that affects business operation, especially in regard to OH&S and environmental issues, equal opportunity, industrial relations and anti-discrimination
- e-business culture
- e-business terminology
- principles of customer service and its application to an online environment
- customer concerns with online business
- techniques for dealing with customers with special needs
- legal and ethical requirements
- computer skills for data analysis
- literacy skills to interpret requirements and develop policy and strategies
- communication skills to review customer service and implement strategies
- ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities.

### Linkages to Other Units

This unit has linkages to the following unit/s and combined training and assessment may be appropriate:

- BSBEBUS408A Implement and monitor delivery of quality customer service online
- BSBEBUS614A Build online customer loyalty

### Critical Aspects of Assessment

Evidence of the following is critical:

- integrated demonstration of all elements of competency and their performance criteria
- determination of the source and level of customer dissatisfaction and refining strategies in response.

### Context of Assessment and Resource Implications

Assessment must ensure:

- competency is demonstrated by performance of all state criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence guide, and within the scope as defined by the Range Statement
- assessment takes account of the endorsed assessment guidelines in the Business Services Training Package
- assessment of performance requirements in this unit is undertaken in an actual workplace or simulated environment
- assessment reinforces the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit.
- the learner and trainer have access to appropriate documentation and resources normally used in the workplace

- in order to achieve consistency of performance, evidence is collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations.

### Assessment Methods

Assessment methods must be chosen to ensure that repair or servicing of a chassis can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- project to develop an online customer service strategy for a particular enterprise taking into consideration the enterprise market and product
- oral or written questions to assess knowledge of legal, ethical requirements, protocols, enterprise policies
- evaluation of progress reports developed by the candidate to monitor and evaluate the customer service against key performance indicators and sales figures
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

### Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform Level 2 = Administer and Manage Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	3	Determining customer service requirements
Communicating Ideas and Information	3	Developing policies and strategies for online customer service
Planning and Organising Activities	2	Monitoring and evaluating online customer service
Working with Others and in Teams	3	Gathering feedback from customers and staff
Using Mathematical Ideas and Techniques	2	Analysing online data
Solving Problems	3	Matching services to customer skill levels
Using Technology	1	Analysing online data

## BSBEBUS614A      Build online customer loyalty

### Unit Descriptor

This unit covers development, implementation and monitoring of customer loyalty strategies for e-business.

This unit is related to BSBEBUS408A Implement and monitor delivery of quality customer service online. Consider co-assessment with BSBEBUS613A Develop online customer service strategies.

Element	Performance Criteria
<b>1      Establish online customer relationship management objectives</b>	<p>1.1      Online customer market segments are identified and customer intelligence gathered from multiple sources to determine factors that influence online customer loyalty.</p> <p>1.2      Online customer profiles are prepared for identified customer segments to target online <i>customer loyalty strategies</i>.</p> <p>1.3      Product/service quality and online customer service strategies are assessed to determine their influence on relationship marketing in an e-business.</p> <p>1.4      Customer loyalty objectives address the development of long term partnerships of mutual benefit to the customer and the e-business.</p>
<b>2      Develop online customer relationship management strategies</b>	<p>2.1      Online customer profile information is assessed to determine approach, and strategies are developed to attract and retain customers in accordance with the e-business strategy.</p> <p>2.2      Customer loyalty strategies address integration of <i>technologies</i> serving online customers.</p> <p>2.3      Customer loyalty strategies include options for <i>cross-selling</i> and <i>up-selling</i>.</p> <p>2.4      Customer loyalty strategies include targets, costs, timeframes and success measures and meet <i>legal and ethical requirements</i>.</p> <p>2.5      Customer relationship management software is assessed for use in determining customer value and building customer loyalty.</p>

- |   |     |  |
|---|-----|--|
| <b>3. Implement and monitor online customer relationship management</b> | 3.1 | Promotional activities are developed and promoted to existing and potential online customers.  |
|   | 3.2 | <i>Multiple channels</i> are used to maximise promotional effort to customer segments.   |
|   | 3.3 | Products and services are customised for target online customer market segments and personalised online service is provided.   |
|   | 3.4 | Customer relationship management software is used if required to monitor progress in building customer loyalty.  |
|   | 3.5 | Online customer <i>information and history</i> are recorded in online database/s for analysis and targeting opportunities in accordance with legal and ethical requirements. |
| <b>4. Evaluate online customer relationship management</b>              | 4.1 | Data relating to success measures are analysed to measure the achievement of online customer loyalty objectives.   |
|   | 4.2 | The effectiveness of online customer loyalty strategies is evaluated and the results used to review and improve future strategies.   |

## Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace may include:

- award and enterprise agreements
- national, State/Territory legislative requirements especially in regard to OH&S
- industry codes of practice
- OECD International Guidelines for Consumer Protection in E-Commerce
- copyright laws
- privacy legislation
- intellectual property, confidentiality requirements
- legal and regulatory policies affecting e-business.

e-business is:

- every type of business transaction in which the participants (ie suppliers, end users etc) prepare or transact business or conduct their trade in goods or services electronically (Definition of e-commerce in E-competent Australia, ANTA, May 2000).

Customer relationship management refers to:

- methods of building customer loyalty, and developing partnerships that have mutual benefits for customers and the enterprise.

Customer loyalty strategies may include:

- reward schemes
- credit or discount facilities
- customer 'clubs'.

Technologies serving online customers may include:

- Internet
- email
- facsimile
- telephone
- call centres
- mobile technology
- wireless technology
- satellite technology.

Up-selling refers to:

- increasing the value of customer orders.

Cross-selling refers to:

- introducing additional products or services to customers outside the expected product range.

Legal and ethical requirements may include:

- privacy
- confidentiality
- security
- legislation
- regulations
- codes of practice
- ethical principles
- policies and guidelines
- society's expectations
- cultural expectations and influences
- social responsibilities eg protection of children, environmental issues.

Multiple channels may include:

- Internet
- email
- facsimile
- telephone
- post.

Information and history may include:

- demographic information
- psychographic information
- purchasing history
- transaction values
- promotion responses

- acquisition sources.

## **Evidence Guide**

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

### **Essential Knowledge and Skills to Be Assessed**

Knowledge and skills in the following areas must be assessed as part of this unit:

- relevant legislation from all levels of government that affects business operation, especially in regard to OH&S and environmental issues, equal opportunity, industrial relations and anti-discrimination
- market segmentation
- influences on consumer behaviour
- marketing fundamentals
- e-business culture
- e-business terminology
- legal and ethical requirements
- computer skills for using customer relationship management software and online databases, and navigating the Internet
- literacy skills to interpret requirements and develop customer loyalty strategies
- numeracy skills for evaluation of data and statistical data interpretation to identify trends
- communication skills to personalise customer service and implement strategies
- ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities.

### **Linkages to Other Units**

This unit has linkages to the following unit/s and combined training and assessment may be appropriate:

- BSBEBUS408A Implement and monitor delivery of quality customer service online
- BSBEBUS613A Develop online customer service strategies

### **Critical Aspects of Assessment**

Evidence of the following is critical:

- integrated demonstration of all elements of competency and their performance criteria
- integrated strategies for customer relationship management targeted to particular customer segments.

### **Context of Assessment and Resource Implications**

Assessment must ensure:

- competency is demonstrated by performance of all state criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence guide, and within the scope as defined by the Range Statement
- assessment takes account of the endorsed assessment guidelines in the Business Services Training Package
- assessment of performance requirements in this unit is undertaken in an actual workplace or simulated environment
- assessment reinforces the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit.

- the learner and trainer have access to appropriate documentation and resources normally used in the workplace
- in order to achieve consistency of performance, evidence is collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations.

### Assessment Methods

Assessment methods must be chosen to ensure that repair or servicing of a chassis can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- project to evaluate online customer loyalty through comparison of figures and customer feedback
- oral or written questions to assess knowledge of customer relationship management strategies, legal and ethical requirements, options for promotions, and methods for targeting needs of particular groups
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

### Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform Level 2 = Administer and Manage Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	3	Gathering customer intelligence from multiple sources
Communicating Ideas and Information	3	Communicating to customers via multiple communication channels
Planning and Organising Activities	3	Segmenting the online customer market
Working with Others and in Teams	3	Personalising customer services
Using Mathematical Ideas and Techniques	2	Analysing data
Solving Problems	3	Customising products and services
Using Technology	2	Managing customer loyalty strategies

## **BSBEBUS408A      Implement and monitor delivery of quality customer service online**

### **Unit Descriptor**

This unit covers implementation and monitoring of online customer service policy, developing and enhancing customer relationships online, integrating customer service into business processes and continuous improvement of customer service in accordance with company policy.

This unit is related to BSBEBUS613A Develop online customer service strategies and BSBEBUS614A Build online customer loyalty. Consider co-assessment with BSBEBUS404A Trade online.

<b>Element</b>	<b>Performance Criteria</b>
<b>1      Implement online customer service policy</b>	<p>1.1      Customer service strategies are implemented in accordance with organisational policy and standards for online service.</p> <p>1.2      <i>Online services</i> are matched to the skill levels of <i>customers</i> and coaching/mentoring provided on or off-line to assist where necessary.</p> <p>1.3      Access and security of online services is monitored and problems are rectified or notified online in accordance with organisational timelines and standards.</p> <p>1.4      On and off-line communication with customers occurs in accordance with organisational requirements and the business' customer service standards.</p> <p>1.5      <i>Customer difficulties and complaints</i> are resolved in accordance with customer service standards and protocols.</p>
<b>2      Develop and enhance customer relationships using online means</b>	<p>2.1      Customer service strategies are personalised to meet individual needs in accordance with customer service standards and legal and ethical requirements.</p> <p>2.2      Customer needs and preferences are analysed and opportunities for customised service assessed and implemented in accordance with customer service policy and level of authority.</p>



- |  |            |   |
|--|------------|---|
| <b>3. Integrate online customer services into business processes</b> | <b>3.1</b> | Business processes and staff training to support the delivery of quality customer service online are determined and implemented in consultation with relevant personnel.  |
|  | <b>3.2</b> | <i>Operational areas</i> of the business impacting on the delivery of quality customer service online are identified, and complementary procedures implemented to enable their integration in accordance with online customer service policy. |
| <b>4. Monitor and continuously improve online customer services</b>  | <b>4.1</b> | Regular feedback is gathered from online customer communications to gauge levels of satisfaction to complement formal feedback procedures.  |
|  | <b>4.2</b> | <i>Customer service feedback</i> is recorded, analysed and reported in accordance with organisational requirements.   |
|  | <b>4.3</b> | Business processes/suggestions identified in customer feedback are reviewed and recommendations made for improved services in accordance with customer service policy and procedures.   |
|  | <b>4.4</b> | New and improved services are identified and recommended in response to customer and staff input in accordance with organisational policy and procedures.   |
|  | <b>4.5</b> | The effectiveness of competitors' solutions/customer service strategies are analysed and new technology or e-business solutions are identified for clients.   |

## Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

- Legislation, codes and national standards relevant to the workplace may include:
- award and enterprise agreements
- national, State/Territory legislative requirements especially in regard to OH&S
- industry codes of practice
- OECD International Guidelines for Consumer Protection in E-Commerce
- copyright laws
- defamation laws
- privacy legislation

- intellectual property, confidentiality requirements
- legal and regulatory policies affecting e-business
- net etiquette.

e-business is:

- every type of business transaction in which the participants (ie suppliers, end users etc) prepare or transact business or conduct their trade in goods or services electronically (Definition of e-commerce in E-competent Australia, ANTA, May 2000).

Online services may include:

- online registration
- access to product database by customers online
- online ordering
- online payments
- access to purchase, delivery and account records online
- two-way communication online
- quick/reasonable response
- call/contact centre.

Customers may include:

- internal
- external.

Customer difficulties and complaints may include:

- difficulty accessing services
- customer dissatisfaction with service quality
- services not available
- unfriendly website design
- website faults
- inactive links
- time taken to access services
- administrative errors such as incorrect invoices or prices
- supply errors such as incorrect product delivered
- service errors
- delivery errors
- products not delivered on time
- damaged goods or goods not delivered
- not appreciating differing hardware and software.

Operational areas may include:

- marketing and sales
- administration
- accounting
- service support
- procurement.

Customer service feedback may include:

- positive and negative comments made in online communications
- responses via online feedback mechanisms
- telephone
- face-to-face

- letters
- emails
- secondhand feedback
- increase in sales results etc through e-business.

## **Evidence Guide**

The Evidence Guide identifies the critical aspects, underpinning knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

### **Essential Knowledge and Skills to Be Assessed**

Knowledge and skills in the following areas must be assessed as part of this unit:

- relevant legislation from all levels of government that affects business operation, especially in regard to OH&S and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Internet/World Wide Web
- e-business culture
- e-business terminology
- principles of customer service and its application to an online environment
- customer concerns with online business
- techniques for dealing with customers with special needs
- legal and ethical requirements
- computer skills for online communication
- literacy skills to interpret requirements and personalise/customise responses
- communication skills, including negotiation and conflict resolution, to resolve customer difficulties and complaints
- ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities.

### **Linkages to Other Units**

This unit has linkages to the following unit/s and combined training and assessment may be appropriate:

- BSBEBUS613A Develop online customer service strategies
- BSBEBUS614A Build online customer loyalty
- BSBEBUS404A Trade online

### **Critical Aspects of Assessment**

Evidence of the following is critical:

- integrated demonstration of all elements of competency and their performance criteria
- personalised and customised services continue to meet legal and ethical requirements and online customer service standards.

### **Context of Assessment and Resource Implications**

Assessment must ensure:

- competency is demonstrated by performance of all state criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence guide, and within the scope as defined by the Range Statement
- assessment takes account of the endorsed assessment guidelines in the Business Services Training Package

- assessment of performance requirements in this unit is undertaken in an actual workplace or simulated environment
- assessment reinforces the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit.
- the learner and trainer have access to appropriate documentation and resources normally used in the workplace
- in order to achieve consistency of performance, evidence is collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations.

### Assessment Methods

Assessment methods must be chosen to ensure that repair or servicing of a chassis can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- project to implement, monitor and evaluate online customer service policy for a particular enterprise
- case studies to examine strategies to handle customer difficulties and complaints
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

### Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform Level 2 = Administer and Manage Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	3	Gauging customer needs and requirements Measuring customer satisfaction in support of continuous improvement policies
Communicating Ideas and Information	3	Identifying customer needs and requirements Improving customer satisfaction Assisting online customers
Planning and Organising Activities	2	Monitoring and continuously improving online customer service Integrating online customer services with business operations
Working with Others and in Teams	3	Improving integration of online customer services with business processes Improving online customer service through staff training and use of feedback from customers and team members
Using Mathematical Ideas and Techniques	1	Analysing feedback data

Solving Problems	2	Delivering quality online customer service while resolving customer difficulties and complaints
Using Technology	2	Providing online customer service

## BSBEBUS604A      Develop a business website strategy

### Unit Descriptor

This unit covers development of a web strategy that supports the business strategy, determining marketing objectives and strategies for the website and planning its integration into business operations.

This unit is related to BSBEBUS506A Plan and develop a business website and BSBEBUS507A Manage the business aspects of a website. Consider co-assessment with BSBEBUS601A Develop an e-business strategy.

Element	Performance Criteria
<b>1      Determine the business' requirements of the website</b>	<ul style="list-style-type: none"><li>1.1      The commercial, business and/or marketing purpose of the website is determined in consultation with <i>relevant personnel</i> in accordance with the organisation's e-business and/or e-marketing strategy.</li><li>1.2      Business, product/service information for the website is determined in consultation with relevant personnel.</li><li>1.3      The business image to be projected by the website is determined in consultation with relevant personnel.</li><li>1.4      <i>Website features/capabilities</i> are determined in consultation with relevant personnel in accordance with the organisation's e-business strategy.</li></ul>
<b>2      Determine business and marketing objectives for the website</b>	<ul style="list-style-type: none"><li>2.1      Key characteristics, competitive factors and the market situation facing the business and/or its products or services are identified.</li><li>2.2      Information on the target audience for the website is gathered and analysed.</li><li>2.3      Website marketing objectives are written in measurable terms and provide specific guidance on what is to be achieved by the website.</li><li>2.4      A <i>business performance strategy</i> is developed for the website incorporating business objectives for products/services.</li></ul>

- |  |   |
|--|---|
| <b>3. Develop a website strategy</b>                               | <p>3.1 Strategies to achieve website marketing objectives are determined in accordance with the organisation's e-business and/or e-marketing strategy.</p> <p>3.2 Timeframes for development and implementation of the website are determined in accordance with the organisation's e-business strategy.</p> <p>3.3 A budget for development, setup, hosting and <i>maintenance</i> of the website is determined in accordance with the organisation's overall e-business budget.</p> <p>3.4 The strategy includes an implementation and maintenance plan, strategies to work cooperatively with technical personnel, performance measures and monitoring procedures to measure the marketing effectiveness of the website.</p> <p>3.5 A web content management strategy is developed to ensure up-to-date, relevant, accurate information on the site.</p> <p>3.6 The strategy includes marketing strategies for <i>publicising</i> that the website is available and operational.</p> |
| <b>4. Plan integration of the website into business operations</b> | <p>4.1 Links between the website and <i>operational areas</i> of the business are identified and responsibility for the development of procedures to enable their integration is assigned in accordance with the overall e-business strategy.</p> <p>4.2 Feedback mechanisms and processes are determined to gauge customer satisfaction with the website and the business, and to allow evaluation of the website as a marketing tool.</p>   |

## Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace may include:

- award and enterprise agreements
- national, State/Territory legislative requirements especially in regard to OH&S
- industry codes of practice
- OECD International Guidelines for Consumer Protection in E-Commerce
- copyright laws

- privacy legislation
- intellectual property, confidentiality requirements
- legal and regulatory policies affecting e-business.

Relevant personnel may include:

- owner/s
- management
- in-house or contracted marketing personnel
- in-house or contracted technology/technical personnel
- web hosting service personnel
- client stakeholders.

Website features/capabilities may include:

- marketing features
- legal requirements
- privacy and confidentiality requirements
- security requirements
- authentication facility or link
- customer service requirements
- shopping cart facilities
- electronic payment facilities
- online catalogues, brochures
- knowledge bases
- frequently asked questions (FAQS)
- thumbnails, image maps etc
- active links
- navigation buttons
- frames, animation, flash etc
- colour, sound, video, graphics, photos
- downloadable files
- search facility
- facility for user feedback on content and operation of website.

Business performance strategy may include:

- service objectives
- logistics of product supply, pricing, delivery and inventory management.

Maintenance issues may include:

- frequency of updates
- timeliness
- responsible staff
- maintenance workload
- optimisation of feedback.

Publicity strategies may include:

- use of traditional media publicity
- newsgroup notice
- Internet chat room
- registration with commonly used search engines
- links to other sites
- design of site ie key words.



Operational areas may include:

- marketing and sales
- customer service
- supply and dispatch of goods
- service support/after sales service
- administration
- finance
- training and development
- user groups.

## **Evidence Guide**

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

### **Essential Knowledge and Skills to Be Assessed**

Knowledge and skills in the following areas must be assessed as part of this unit:

- relevant legislation from all levels of government that affects business operation, especially in regard to OH&S and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Internet
- World Wide Web
- uniform resource locators (URL)
- browsers, search engines, web crawlers
- e-business
- e-Marketing principles
- features of a marketing oriented website
- ways to increase the marketing effectiveness of a website
- strategic planning
- computer technology skills
- Communication skills to consult with relevant personnel on website purpose, image and capabilities
- literacy skills to gather and analyse information on the business, its products/services and the target audience for the website
- numeracy skills for costing, and meeting budgetary requirements
- ability to relate to stakeholders from a range of social, cultural and ethnic backgrounds and physical and mental abilities.

### **Linkages to Other Units**

This unit has linkages to the following unit/s and combined training and assessment may be appropriate:

- BSBEBUS506A Plan and develop a business website
- BSBEBUS507A Manage the business aspects of a website
- BSBEBUS601A Develop an e-business strategy

### **Critical Aspects of Assessment**

Evidence of the following is critical:

- integrated demonstration of all elements of competency and their performance criteria
- knowledge of the features of a marketing oriented website

- ways to increase the marketing effectiveness of a website.

### Context of Assessment and Resource Implications

Assessment must ensure:

- competency is demonstrated by performance of all state criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence guide, and within the scope as defined by the Range Statement
- assessment takes account of the endorsed assessment guidelines in the Business Services Training Package
- assessment of performance requirements in this unit is undertaken in an actual workplace or simulated environment
- assessment reinforces the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit.
- the learner and trainer have access to appropriate documentation and resources normally used in the workplace
- in order to achieve consistency of performance, evidence is collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations.

### Assessment Methods

Assessment methods must be chosen to ensure that repair or servicing of a chassis can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- project to develop a website strategy for a particular enterprise taking into consideration enterprise environment and capabilities, products and services of threats, costs and benefits of website development and maintenance, and including budgets, action plans and timelines
- oral or written questions to assess understanding of links between the website and operational areas of the business
- project to develop a monitoring and evaluation strategy system for a website for an enterprise
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

### Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform Level 2 = Administer and Manage Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	3	Determining the target audience for the website
Communicating Ideas and Information	3	Consulting with relevant personnel regarding the website purpose and capabilities
Planning and Organising Activities	3	Integrating the website into business operations

Working with Others and in Teams	3	Determining the organisation's business image to be projected
Using Mathematical Ideas and Techniques	2	Costing the development, setup and maintenance of the business website
Solving Problems	3	Increasing the marketing effectiveness of a website
Using Technology	2	Preparing a business website strategy

## **BSBEBUS507A      Manage the business aspects of a website**

### **Unit Descriptor**

This unit covers business management and on-going monitoring of a website to continuously improve its effectiveness.

This unit is related to BSBEBUS604A Develop a business website strategy. Consider co-assessment with BSBEBUS506A Plan and develop a business website and BSBEBUS508A Build a virtual community.

<b>Element</b>	<b>Performance Criteria</b>
<b>1      Develop website management policy and procedures</b>	<p>1.1      Standards and procedures for website content management are developed and implemented in accordance with business website strategy.</p> <p>1.2      Content management procedures provide for updates of existing information as well as new information and customer services to be added to the site in response to user comments.</p> <p>1.3      Requirements for site <i>maintenance</i> of the website are determined in accordance with business website strategy and budgetary requirements.</p>
<b>2      Integrate a website into business operations</b>	<p>2.1      Responsibility for website maintenance within the organisation is determined in accordance with human resource management policy and the overall e-business strategy.</p> <p>2.2      Business processes to support the website are determined and implemented in consultation with relevant personnel.</p> <p>2.3      Links between the website and <i>operational areas</i> of the business are identified and procedures developed to enable their integration in accordance with the overall e-business strategy and budgetary requirements.</p> <p>2.4      Operational areas are monitored and opportunities are taken to adjust policies and processes in accordance with level of responsibility and authority, to ensure effective integration with website operation.</p>

- |   |  |     |  |     |  |     |  |     |  |
|---|--|-----|--|-----|--|-----|--|-----|--|
| <b>3. Monitor and review website performance and outcomes</b> | <table border="0"><tr><td style="vertical-align: top; padding-right: 10px;">3.1</td><td>Feedback from users and customers is used to evaluate the effectiveness of the website and recommend improvements.</td></tr><tr><td style="vertical-align: top; padding-right: 10px;">3.2</td><td>Regular review of the implementation of the website strategy is undertaken and business data/reports are to compare plans, budgets and objectives with actual performance.</td></tr><tr><td style="vertical-align: top; padding-right: 10px;">3.3</td><td>Business outcomes related to the website are evaluated against objectives to measure the effectiveness of the website and recommendations are made for improvements.</td></tr><tr><td style="vertical-align: top; padding-right: 10px;">3.4</td><td>The effectiveness of web server hosting arrangements is evaluated and inadequacies dealt with in accordance with organisational policy and procedures.</td></tr></table> | 3.1 | Feedback from users and customers is used to evaluate the effectiveness of the website and recommend improvements. | 3.2 | Regular review of the implementation of the website strategy is undertaken and business data/reports are to compare plans, budgets and objectives with actual performance. | 3.3 | Business outcomes related to the website are evaluated against objectives to measure the effectiveness of the website and recommendations are made for improvements. | 3.4 | The effectiveness of web server hosting arrangements is evaluated and inadequacies dealt with in accordance with organisational policy and procedures. |
| 3.1   | Feedback from users and customers is used to evaluate the effectiveness of the website and recommend improvements.   |     |  |     |  |     |  |     |  |
| 3.2   | Regular review of the implementation of the website strategy is undertaken and business data/reports are to compare plans, budgets and objectives with actual performance.   |     |  |     |  |     |  |     |  |
| 3.3   | Business outcomes related to the website are evaluated against objectives to measure the effectiveness of the website and recommendations are made for improvements.   |     |  |     |  |     |  |     |  |
| 3.4   | The effectiveness of web server hosting arrangements is evaluated and inadequacies dealt with in accordance with organisational policy and procedures.   |     |  |     |  |     |  |     |  |

### Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace may include:

- award and enterprise agreements
- national, State/Territory legislative requirements especially in regard to OH&S
- industry codes of practice
- OECD International Guidelines for Consumer Protection in E-Commerce
- copyright laws
- privacy legislation
- intellectual property, confidentiality requirements
- legal and regulatory policies affecting e-business.

Maintenance issues may include:

- frequency of updates
- maintenance workload.

Operational areas may include:

- marketing and sales
- administration
- accounting
- service support
- procurement.

## Evidence Guide

The Evidence Guide identifies the critical aspects, underpinning knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

### Essential Knowledge and Skills to Be Assessed

Knowledge and skills in the following areas must be assessed as part of this unit:

- relevant legislation from all levels of government that affects business operation, especially in regard to OH&S and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Internet/World Wide Web
- e-business environment
- e-business terminology
- website business content and management
- legal, ethical and security issues relating to websites
- culture of e-business versus traditional business models
- implementation issues
- website marketing
- computer technology skills
- literacy skills to interpret policies and procedures and provide information to others
- numeracy skills for reviewing performance against budget
- communication skills for consultation with users, supply chain and customers
- ability to relate to stakeholders from a range of social, cultural and ethnic backgrounds and physical and mental abilities.

### Linkages to Other Units

This unit has linkages to the following unit/s and combined training and assessment may be appropriate:

- BSBEBUS604A Develop a business website strategy
- BSBEBUS506A Plan and develop a business website
- BSBEBUS508A Build a virtual community.

### Critical Aspects of Assessment

Evidence of the following is critical:

- integrated demonstration of all elements of competency and their performance criteria
- fine tuning of processes to deal with contingencies and feedback from users.

### Context of Assessment and Resource Implications

Assessment must ensure:

- competency is demonstrated by performance of all state criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence guide, and within the scope as defined by the Range Statement
- assessment takes account of the endorsed assessment guidelines in the Business Services Training Package
- assessment of performance requirements in this unit is undertaken in an actual workplace or simulated environment
- assessment reinforces the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit.

- the learner and trainer have access to appropriate documentation and resources normally used in the workplace
- in order to achieve consistency of performance, evidence is collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations.

### Assessment Methods

Assessment methods must be chosen to ensure that repair or servicing of a chassis can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- evaluation of the integration of a website into a business plan developed by the candidate
- oral or written questioning to assess knowledge of features, security requirements, ISP services and website options and requirements and benefits and costs to business
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

### Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform Level 2 = Administer and Manage Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	3	Monitoring and reviewing website performance Gathering information for website maintenance and for future development
Communicating Ideas and Information	3	Communication of policies and business processes to support the website Acting on advice from feedback from users and customers
Planning and Organising Activities	3	Integrating the website with business operations
Working with Others and in Teams	2	Gathering feedback from website users and customers Recommending changes Seeking expert advice Consulting with relevant personnel
Using Mathematical Ideas and Techniques	2	Conducting data analysis
Solving Problems	3	Adapting to contingencies Integrating the website into operational areas of the business to ensure that actual performance meets organisational standards and procedures
Using Technology	2	Managing a website

## **BSBEBUS407A      Review and maintain the business aspects of a website**

### **Unit Descriptor**

This unit covers data analysis, review of website content and updating and maintenance of the business aspects of a website.

This unit is related to BSBEBUS507A Manage the business aspects of a website.

<b>Element</b>	<b>Performance Criteria</b>
<b>1      Review website content and use</b>	<ul style="list-style-type: none"><li>1.1      Customer and user feedback is monitored and analysed in accordance with organisational timelines.</li><li>1.2      Automatically collected website data is analysed and trends identified.</li><li>1.3      Recommendations are made on changes to the website and its content in response to feedback and data analysis and approved changes scheduled for implementation.</li><li>1.4      Cost implications of the recommended changes are reviewed to determine their viability.</li></ul>
<b>2      Update website</b>	<ul style="list-style-type: none"><li>2.1      Superseded and inaccurate information is replaced with current information and additional material is added in accordance with organisational requirements.</li><li>2.2      Protocols for ensuring the accuracy and authenticity of information are followed.</li><li>2.3      Services no longer available or required are removed and new ones added in accordance with organisational requirements.</li><li>2.4      Off-line information is checked against that posted on the website and discrepancies rectified in accordance with organisational timelines.</li><li>2.5      Security procedures for updating the website are followed.</li></ul>



- |  |  |     |   |     |   |     |   |     |   |
|--|--|-----|---|-----|---|-----|---|-----|---|
| <b>3. Carry out non-technical site maintenance</b> | <table border="0"><tr><td style="vertical-align: top; padding-right: 20px;">3.1</td><td>User feedback is analysed to confirm that faults have resulted from the site and are not user problems.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">3.2</td><td>Faults are rectified and improvements made to the site in response to user feedback approved by the organisation.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">3.3</td><td>New web pages and/or active links are added and redundant pages and links removed in accordance with organisational requirements.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">3.4</td><td>Site changes are made in response to changes in e-marketing strategy in accordance with organisational requirements and consideration of cost benefits.</td></tr></table> | 3.1 | User feedback is analysed to confirm that faults have resulted from the site and are not user problems. | 3.2 | Faults are rectified and improvements made to the site in response to user feedback approved by the organisation. | 3.3 | New web pages and/or active links are added and redundant pages and links removed in accordance with organisational requirements. | 3.4 | Site changes are made in response to changes in e-marketing strategy in accordance with organisational requirements and consideration of cost benefits. |
| 3.1  | User feedback is analysed to confirm that faults have resulted from the site and are not user problems.  |     |   |     |   |     |   |     |   |
| 3.2  | Faults are rectified and improvements made to the site in response to user feedback approved by the organisation.  |     |   |     |   |     |   |     |   |
| 3.3  | New web pages and/or active links are added and redundant pages and links removed in accordance with organisational requirements.  |     |   |     |   |     |   |     |   |
| 3.4  | Site changes are made in response to changes in e-marketing strategy in accordance with organisational requirements and consideration of cost benefits.  |     |   |     |   |     |   |     |   |

### **Range Statement**

The Range Statement provides advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace may include:

- award and enterprise agreements
- national, State/Territory legislative requirements especially in regard to OH&S
- industry codes of practice
- OECD International Guidelines for Consumer Protection in E-Commerce
- copyright laws
- defamation laws
- privacy legislation
- intellectual property, confidentiality requirements
- legal and regulatory policies affecting e-business
- enterprise standards
- legal deposit, archival and disposal laws i.e. old copies of web pages must be recoverable eg customers may have undertaken transactions based on older versions of web pages and these must be available for legal reasons.

### **Evidence Guide**

The Evidence Guide identifies the critical aspects, underpinning knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

### **Essential Knowledge and Skills to Be Assessed**

Knowledge and skills in the following areas must be assessed as part of this unit:

- relevant legislation from all levels of government that affects business operation, especially in regard to OH&S and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Internet/World Wide Web

- website business design and maintenance
- legal, ethical and security issues relating to websites
- e-business
- e-business terminology
- computer literacy
- literacy skills to interpret policies and procedures and provide information to others
- numeracy and basic statistical skills for website data analysis
- communication skills for consultation with users, and customers
- ability to relate to stakeholders from a range of social, cultural and ethnic backgrounds and physical and mental abilities.

### **Linkages to Other Units**

This unit has linkages to the following unit/s and combined training and assessment may be appropriate:

- BSBEBUS507A Manage the business aspects of a website.

### **Critical Aspects of Assessment**

Evidence of the following is critical:

- integrated demonstration of all elements of competency and their performance criteria
- website and its content continues to meet the requirements of the business after maintenance changes.

### **Context of Assessment and Resource Implications**

Assessment must ensure:

- competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- assessment takes account of the endorsed assessment guidelines in the Business Services Training Package
- assessment of performance requirements in this unit is undertaken in an actual workplace or simulated environment
- assessment reinforces the integration of the key competencies and the business services common competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit
- the learner and trainer have access to appropriate documentation and resources normally used in the workplace
- in order to achieve consistency of performance, evidence is collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations.

### **Assessment Methods**

Assessment methods must be chosen to ensure that repair or servicing of a chassis can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- evaluation of a review of a website by the candidate conducted over a period of time
- oral or written questioning to assess knowledge benefits and costs to business of website, legislative requirements relevant to the operation of a website, issues related to privacy
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

**Key Competencies in this Unit**

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform Level 2 = Administer and Manage Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	3	Evaluating and reviewing website content and use Updating and enhancing website content
Communicating Ideas and Information	3	Receiving and conveying information on current use and needs Gathering information to aid decision making for recommendations for website changes
Planning and Organising Activities	3	Maintaining and monitoring the website Investigating, initiating, evaluating and implementing changes and updates
Working with Others and in Teams	2	Gaining feedback on website use and content
Using Mathematical Ideas and Techniques	2	Analysing website data
Solving Problems	3	Evaluating and implementing changes and updates Rectifying faults and correcting inaccuracies
Using Technology	3	Maintaining a website

## **THHGCT05A Build and launch a website for a small business**

### **Unit Descriptor**

This unit deals with the skills and knowledge required to build a basic website to meet business needs, including selecting a hosting service and appropriate web development software, planning the structure and undertaking the actual construction of the site. As such it requires the technical skills and knowledge typically needed by a business which elects to develop its own site rather than access the services of IT professionals.

This unit satisfies the requirements of unit BSBEBUS506A Plan and develop a business website in the Business Services Training Package. The unit has been customised to more clearly articulate the technical skills required for building a website and to define the scope of skills and knowledge required.

<b>Element</b>	<b>Performance Criteria</b>
<b>1 Plan website structure</b>	<ul style="list-style-type: none"><li>1.1 Develop website style and structure to suit the business purpose and intended target audience in accordance with the business website strategy.</li><li>1.2 Identify and include appropriate features and capabilities within the website structure.</li><li>1.3 Determine layout and navigation requirements in relation to appearance, readability, links and ease of operation.</li><li>1.4 Document structure clearly and accurately to facilitate an efficient development process.</li><li>1.5 Develop and integrate appropriate interactive forms into the website structure to capture customer data.</li><li>1.6 Select authoring tools and software based on website requirements.</li><li>1.7 Identify and integrate website security requirements into the development process.</li></ul>

- |  |   |
|--|---|
| <b>2 Develop website content</b>               | <p>2.1 Select and use business information to create website content in accordance with the business website strategy.</p> <p>2.2 Define appropriate information for inclusion in interactive forms based on the purpose of the form.</p> <p>2.3 Adapt information for inclusion on the web to ensure site clarity, scanability and readability.</p> <p>2.4 Use language style and tone which are suited to the business image to be conveyed and to the intended target audience.</p> <p>2.5 Integrate content features into the website in accordance with the website structure and plan.</p> <p>2.6 Check content for accuracy, currency and relevance in accordance with website plan and purpose.</p>                       |
| <b>3. Create website pages</b>                 | <p>3.1 Create a plan for website pages and active links to meet layout and ease of navigation.</p> <p>3.2 Select page titles and key words to reflect the business purpose and content of the website and to assist access via search engines.</p> <p>3.3 Improve page presentation by adding features which will enhance web pages including use of frames, colour, photographic images, graphics and text enhancement.</p> <p>3.4 Develop linked web pages in accordance with the website plan, ensuring links are clearly named and unambiguous.</p> <p>3.5 Use appropriate techniques to create interactive forms within website pages.</p> <p>3.6 Create all pages to be consistent with site design and specifications.</p> |
| <b>4. Select and use a web hosting service</b> | <p>4.1 Identify relevant sources of information on web hosting options.</p> <p>4.2 Evaluate different web hosting services and select in accordance with business and technical requirements.</p> <p>4.3 Upload files to selected web hosting service in accordance with technical requirements and business arrangements.</p>  |

- |  |   |
|--|---|
| <b>5. Test and critically evaluate website</b> | <p>5.1 Test website functions, processes and navigation to confirm its operational status, appearance, accuracy and ease of operation.</p> <p>5.2 Evaluate the effectiveness of interactive forms to ensure that required sales data is collected for the business.</p> <p>5.3 Evaluate the website to ensure it projects a business image suited to the e-business model in accordance with the business website strategy.</p> |
|--|---|

## Range Statement

The following explanations identify how this unit may be applied in different workplaces and circumstances.

Legislation, codes and national standards relevant to the workplace may include:

- award and enterprise agreements
- national, State/Territory legislative requirements especially in regard to OH&S
- industry codes of practice
- OECD International Guidelines for Consumer Protection in E-Commerce
- copyright laws
- defamation laws
- privacy legislation
- intellectual property, confidentiality requirements
- legal and regulatory policies affecting e-business.

Relevant sources of information on web hosting options may include:

- Internet Service Providers (ISPs)
- industry associations
- IT media reviews and articles
- Internet.

Website purpose may include:

- promotion
- sales
- contracting and procurement
- auctions.
- provision of information
- collaboration
- support to multiple businesses
- value chain integration
- electronic payments
- consultancy services
- certification.

Website features and capabilities may include:

- marketing features
- legal requirements

- privacy and confidentiality requirements
- security requirements
- authentication facility or link
- customer service requirements
- shopping cart facilities
- electronic payment facilities
- online catalogues, brochures
- knowledge bases
- frequently asked questions (FAQs)
- thumbnails
- active links
- navigation buttons
- colour, sound, video, images, graphics
- downloadable files
- search facility
- facility for user feedback on content and operation of website
- text and tags in HTML (hypertext markup language)
- cut down versions of web pages in WML (wireless markup language) for access by WAP (wireless application protocol) telephones.

Authoring tools and software may include a wide range of text editors/commercial applications such as:

- Wordpad
- Notepad
- Frontpage
- Dreamweaver
- Adobe Photoshop.

Security requirements may include:

- password protection
- limited viewing of rates
- limited downloading of images/image encoding
- payment mechanism.

Content features may include:

- knowledge bases
- products and services
- catalogues
- brochures
- thumbnails
- frequently asked questions (FAQs)
- company profile
- staff profiles
- business history
- client testimonials
- published materials.

Linked pages may include:

- link between a page and the home page (relative links)
- link to a page on another website (fully qualified URL – uniform resource locators).

Page presentation features may include:

- animated sequences
- sound
- movie sequence
- plug ins
- downloadable files
- use of bold, italics, subscript, superscript, strikethrough
- different fonts and font sizes
- colour
- images eg photographs, graphics
- bulleted or numbered lists
- tables
- interactive forms for bookings or enquiries.

Ease of operation may include:

- homepage download time
- time to download files
- difficulty in navigation.

## **Evidence Guide**

### **Essential Knowledge and Skills to Be Assessed**

Knowledge of and skills in the following areas must be assessed as part of this unit:

- general knowledge of the Internet and World Wide Web and its application and relevance to individual businesses
- knowledge of the current e-business environment for a particular business context
- general knowledge of different services and operating systems used by Internet Service Providers (ISPs)
- general principles of website architecture and design
- the role of a website in the marketing mix and ways in which the marketing effectiveness of a website can be enhanced and key features of a marketing-oriented website
- general features of browsers, search engines and web crawlers including how these impact on website design decisions and meta-tags
- the relationships between content and site design
- function and features of micro-content elements such as headings, highlighted words and link text
- knowledge of the underlying impact of HTML and cascading style sheets on site design
- features and users of frames, forms and tables within a website
- techniques for using colour and enhancing text within a website
- techniques for capture and manipulation of digital images and graphics including insertion into a website
- privacy issues and legislative requirements in relation to the development of a website.

### **Linkages to Other Units**

This unit has strong linkages to a range of e-business and marketing units and combined training and assessment may be appropriate. For example:

- BSBEBUS604A Develop a business website strategy
- BSBEBUS507A Manage the business aspects of a website
- BSBEBUS407A Review and maintain the business aspects of a website.



This unit also has linkages to several general computer technology units which cover the basic technical skills needed to operate a computer. For example:

- BSBCMN108A Develop keyboard skills
- BSBCMN205A Use business technology
- BSBCMN306A Produce business documents.

### **Critical Aspects of Assessment**

Evidence of the following is critical:

- ability to build a website to meet a specific business need through the integration and application of appropriate business and technical skills
- knowledge of the key features and functions to be incorporated into a business website.

### **Context of Assessment and Resource Implications**

Assessment must ensure:

- demonstration of skills using current equipment, software and authoring tools to develop a business website to meet a particular business need.

### **Assessment Methods**

Assessment methods must be chosen to ensure that repair or servicing of a chassis can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- evaluation of a website developed by the candidate through testing of the site against key criteria
- oral or written questioning to assess knowledge of functions, features, security requirements, ISP services and website design requirements
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

### **Key Competencies in this Unit**

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform Level 2 = Administer and Manage Level 3 = Design and Evaluate

<b>Key Competencies</b>	<b>Level</b>	<b>Examples</b>
Collecting, Organising and Analysing Information	3	Identifying website structure suitable for the business and determining content and features of the website
Communicating Ideas and Information	3	Using linked web pages and a language style and tone suitable for the business and by the development of customer feedback mechanisms and procedures
Planning and Organising Activities	3	Designing the website including layout and links to complement the business aims and objectives
Working with Others and in Teams	3	Determining the purpose and features of the website, and to determine customer feedback and meet customer requirements

Using Mathematical Ideas and Techniques	2	Creating layouts for web pages
Solving Problems	3	Developing the business website using appropriate information and content and by critically evaluating and testing the website to ensure its usefulness to the development of the business
Using Technology	3	Developing a website

## CUFIMA01A Produce and manipulate digital images

### Unit Descriptor

This unit describes the skills and knowledge required to produce and manipulate digital images for a multimedia production within the cultural industries.

Element	Performance Criteria
<b>1 Assess digital camera qualities</b>	<ul style="list-style-type: none"><li>1.1 Assess camera software compatibility with hardware systems and select appropriate software for the production.</li><li>1.2 Match pixel resolution of the camera to the required quality and resolution of outcome.</li><li>1.3 Check the RAM capacity fo the camera to see that it is appropriate to the number of images required to be captured.</li><li>1.4 Assess shutter speed, focal lengths and camera feature modes as suitable to the quality of and use of photographic image required.</li><li>1.5 Handle and store lithium batteries in accordance with OH&amp;S requirements.</li></ul>

- |  |   |     |  |     |  |     |  |     |  |     |  |     |   |     |   |     |   |     |  |
|--|---|-----|--|-----|--|-----|--|-----|--|-----|--|-----|---|-----|---|-----|---|-----|--|
| <b>2 Photograph and upload a digital image</b>                       | <table border="0"><tr><td style="vertical-align: top; padding-right: 20px;">2.1</td><td>Consider focus and exposure in operation of the digital camera to ensure capture of image meets production requirements.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">2.2</td><td>Ensure correct use of digital image software including entering and exiting the selected software.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">2.3</td><td>Save and retrieve digital photographs using designated file formats.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">2.4</td><td>Load and operate the digital camera in accordance with manufacturer's specifications and appropriate to the quality of image to be photographed.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">2.5</td><td>Upload the IBM-PC or Macintosh card interface/disk onto the relevant computer and save the image on hard disk.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">2.6</td><td>Create and store photographic image files on the computer in accordance with software procedures.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">2.7</td><td>Enhance, crop and alter photographic images electronically to deliver the required image.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">2.8</td><td>Check photographic images for fitness of purpose to comply with specifications.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">2.9</td><td>Assess photographic images for fitness of purpose to comply with specifications.</td></tr></table> | 2.1 | Consider focus and exposure in operation of the digital camera to ensure capture of image meets production requirements. | 2.2 | Ensure correct use of digital image software including entering and exiting the selected software. | 2.3 | Save and retrieve digital photographs using designated file formats. | 2.4 | Load and operate the digital camera in accordance with manufacturer's specifications and appropriate to the quality of image to be photographed. | 2.5 | Upload the IBM-PC or Macintosh card interface/disk onto the relevant computer and save the image on hard disk. | 2.6 | Create and store photographic image files on the computer in accordance with software procedures. | 2.7 | Enhance, crop and alter photographic images electronically to deliver the required image. | 2.8 | Check photographic images for fitness of purpose to comply with specifications. | 2.9 | Assess photographic images for fitness of purpose to comply with specifications. |
| 2.1  | Consider focus and exposure in operation of the digital camera to ensure capture of image meets production requirements.  |     |  |     |  |     |  |     |  |     |  |     |   |     |   |     |   |     |  |
| 2.2  | Ensure correct use of digital image software including entering and exiting the selected software.  |     |  |     |  |     |  |     |  |     |  |     |   |     |   |     |   |     |  |
| 2.3  | Save and retrieve digital photographs using designated file formats.  |     |  |     |  |     |  |     |  |     |  |     |   |     |   |     |   |     |  |
| 2.4  | Load and operate the digital camera in accordance with manufacturer's specifications and appropriate to the quality of image to be photographed.  |     |  |     |  |     |  |     |  |     |  |     |   |     |   |     |   |     |  |
| 2.5  | Upload the IBM-PC or Macintosh card interface/disk onto the relevant computer and save the image on hard disk.  |     |  |     |  |     |  |     |  |     |  |     |   |     |   |     |   |     |  |
| 2.6  | Create and store photographic image files on the computer in accordance with software procedures.   |     |  |     |  |     |  |     |  |     |  |     |   |     |   |     |   |     |  |
| 2.7  | Enhance, crop and alter photographic images electronically to deliver the required image.   |     |  |     |  |     |  |     |  |     |  |     |   |     |   |     |   |     |  |
| 2.8  | Check photographic images for fitness of purpose to comply with specifications.   |     |  |     |  |     |  |     |  |     |  |     |   |     |   |     |   |     |  |
| 2.9  | Assess photographic images for fitness of purpose to comply with specifications.  |     |  |     |  |     |  |     |  |     |  |     |   |     |   |     |   |     |  |
| <b>3. Incorporate digital photography into a multimedia sequence</b> | <table border="0"><tr><td style="vertical-align: top; padding-right: 20px;">3.1</td><td>Create graphics that incorporate the principles of design using the designated software.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">3.2</td><td>Edit, enhance, amend and save digital images using the designated software.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">3.3</td><td>Combine digital images into a designated multimedia sequence.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">3.4</td><td>Integrate digital images into a designated multimedia sequence.</td></tr><tr><td style="vertical-align: top; padding-right: 20px;">3.5</td><td>Evaluate the outcome for visual impact, effectiveness and fitness for purpose.</td></tr></table>   | 3.1 | Create graphics that incorporate the principles of design using the designated software.                                 | 3.2 | Edit, enhance, amend and save digital images using the designated software.                        | 3.3 | Combine digital images into a designated multimedia sequence.        | 3.4 | Integrate digital images into a designated multimedia sequence.  | 3.5 | Evaluate the outcome for visual impact, effectiveness and fitness for purpose.                                 |     |   |     |   |     |   |     |  |
| 3.1  | Create graphics that incorporate the principles of design using the designated software.  |     |  |     |  |     |  |     |  |     |  |     |   |     |   |     |   |     |  |
| 3.2  | Edit, enhance, amend and save digital images using the designated software.   |     |  |     |  |     |  |     |  |     |  |     |   |     |   |     |   |     |  |
| 3.3  | Combine digital images into a designated multimedia sequence.   |     |  |     |  |     |  |     |  |     |  |     |   |     |   |     |   |     |  |
| 3.4  | Integrate digital images into a designated multimedia sequence.   |     |  |     |  |     |  |     |  |     |  |     |   |     |   |     |   |     |  |
| 3.5  | Evaluate the outcome for visual impact, effectiveness and fitness for purpose.  |     |  |     |  |     |  |     |  |     |  |     |   |     |   |     |   |     |  |

## Range Statement

Multimedia productions may include or be included in:

- aspects or sections of film/video production
- feature
- documentary
- short film and/or video
- animations.
- commercials

- live or pre-recorded performances
- music video
- television production of any type (eg music, drama, comedy, variety, sport)
- live or pre-recorded television production
- educational product
- game
- promotional product
- information product
- training product
- e-commerce
- a range of others.

Equipment used:

- appropriate hardware
- software and communication packages
- LANs
- organisation's backup systems.

Multimedia components:

- 2D Graphics
- 3D Graphics
- videos
- sound
- text animation
- scanned images.

Industry standard software may include:

- a wide range of programmes, some current examples of which may be:
- Photoshop
- Pagemill
- Frontpage
- Dreamweaver
- Flash
- Director
- Hyper Studio
- NOTE: These programs are constantly being upgraded and replaced, and appropriate up-to-date programs should be selected.

Camera feature modes may include:

- flash
- scrollage
- icon menu
- close-up
- wide angle and telephoto capacity.

## **Evidence Guide**

### **Essential Knowledge and Skills to Be Assessed**

Knowledge and skills in the following areas must be assessed as part of this unit:

- basic principles of photography and visual design
- knowledge of selected digital image software

- ability to interpret a brief
- knowledge of the limiting factors of computer hardware
- knowledge of computers and computer operating systems
- interpreting simple scripts (texts), specifications and instructions
- interpreting and communicating production specifications.

### **Linkages to Other Units**

This unit has linkages to the following units and combined training delivery and/or assessment is recommended:

- CUFMEM07A Apply principles of visual design/communication to the development of a multimedia project
- CUFMEM10A Design and create a multimedia interface.

### **Critical Aspects of Assessment**

This unit of competence applies to a range of industry sectors. The focus of assessment will depend on the industry sector. Assessment must be customised to meet the needs of the particular sector in which performance is being assessed. Assessment should only address those variable circumstances, listed in the range of variables statements, which apply to the chosen context.

The following evidence is critical to the judgement of competence in this unit:

- ability to assess the capacity to upload and process digital images using industry hardware and software, to deliver a designated quality of image outcome.

### **Context of Assessment and Resource Implications**

Assessment may take place on the job, off the job or a combination of both of these.

Assessment must ensure:

- off the job a ssessment is undertaken in a closely simulated workplace environment
- access to a range of resources and equipment currently used by the multimedia industry.

### **Assessment Methods**

Assessment methods must be chosen to ensure that repair or servicing of a chassis can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- project to develop a series of digital images for a new website, to assess quality of image outcome
- oral questioning/interview to assess technical knowledge of digital camera capabilities for specific uses
- exercises in using camera software/industry standard software to successfully transfer, enhance, crop and alter photographic images
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate to assess quality of image outcome

**Key Competencies in this Unit**

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform Level 2 = Administer and Manage Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	2	Collecting information to be included in a job Determining information about the images required
Communicating Ideas and Information	2	Negotiating with the client about the type, content and style of material required
Planning and Organising Activities	1	Planning a photographing session as part of a project
Working with Others and in Teams	1	Liaising with others in the project team
Using Mathematical Ideas and Techniques	1	Calculating costs of a project Calculating requirements of materials and equipment required
Solving Problems	1	Dealing with technical problems related to the camera and computer
Using Technology	2	Using computers and digital cameras

## BSBEBUS521A      Plan e-marketing communications

### Unit Descriptor

This unit covers online marketing research, preparing an e-marketing plan and a website marketing strategy.

Consider co-assessment with BSBEBUS522A Conduct e-marketing communications.

Element	Performance Criteria
<b>1      Research target markets for electronic marketing</b>	1.1 <i>Criteria for segmenting the market</i> are chosen and applied in accordance with the requirements of the product/service and the marketing strategy.
	1.2      Market segments are evaluated and segment/s chosen for their compatibility with the electronic marketing medium and the features of the product/service and/or the business.
	1.3      Target market requirements are determined and profiles of the target markets are prepared using <i>demographic and/or psychological descriptors</i> .
<b>2      Prepare electronic marketing strategy and plan</b>	2.1      Electronic marketing purpose and objectives are determined in consultation with <i>relevant personnel</i> and are compatible with the business strategy, direction and values of the business.
	2.2      Marketing strategy addresses the aims and targets of the organisation's business plan and meets budgetary requirements.
	2.3      Electronic marketing tools are identified for the business and/or its products or services, costed and detailed in the marketing plan.
	2.4      Marketing plan identifies and incorporates positioning strategies, electronic marketing approaches, tools and strategies to reach target market and achieve objectives.
	2.5      Marketing plan includes an action plan, schedule and budget estimates for costs of developing and implementing the electronic marketing strategy.
	2.6      Marketing plan includes <i>effectiveness measures</i> and meets <i>legal and ethical requirements</i> .



- |  |   |     |   |     |  |     |  |     |  |
|--|---|-----|---|-----|--|-----|--|-----|--|
| <b>3. Prepare a website marketing strategy</b> | <table border="0"><tr><td style="vertical-align: top; padding-right: 10px;">3.1</td><td>Website marketing objectives are determined in accordance with e-marketing strategy and plan.</td></tr><tr><td style="vertical-align: top; padding-right: 10px;">3.2</td><td>Strategy incorporates website design to ensure the required image of the business is projected and the features and benefits of the business' products or services are conveyed in accordance with the overall e-marketing strategy.</td></tr><tr><td style="vertical-align: top; padding-right: 10px;">3.3</td><td>Strategy incorporates website data recording, contacts and feedback mechanisms to allow evaluation of the website as a marketing tool.</td></tr><tr><td style="vertical-align: top; padding-right: 10px;">3.4</td><td>The strategy integrates website marketing into the overall e-marketing strategy.</td></tr></table> | 3.1 | Website marketing objectives are determined in accordance with e-marketing strategy and plan. | 3.2 | Strategy incorporates website design to ensure the required image of the business is projected and the features and benefits of the business' products or services are conveyed in accordance with the overall e-marketing strategy. | 3.3 | Strategy incorporates website data recording, contacts and feedback mechanisms to allow evaluation of the website as a marketing tool. | 3.4 | The strategy integrates website marketing into the overall e-marketing strategy. |
| 3.1  | Website marketing objectives are determined in accordance with e-marketing strategy and plan.   |     |   |     |  |     |  |     |  |
| 3.2  | Strategy incorporates website design to ensure the required image of the business is projected and the features and benefits of the business' products or services are conveyed in accordance with the overall e-marketing strategy.  |     |   |     |  |     |  |     |  |
| 3.3  | Strategy incorporates website data recording, contacts and feedback mechanisms to allow evaluation of the website as a marketing tool.  |     |   |     |  |     |  |     |  |
| 3.4  | The strategy integrates website marketing into the overall e-marketing strategy.  |     |   |     |  |     |  |     |  |

### Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace may include:

- award and enterprise agreements
- national, State/Territory legislative requirements especially in regard to OH&S
- industry codes of practice
- OECD International Guidelines for Consumer Protection in E-Commerce
- copyright laws
- defamation laws
- privacy legislation
- intellectual property, confidentiality requirements
- legal and regulatory policies affecting e-business.

Market segmentation is:

- the process of dividing a market into consumer subgroups, each of which has different needs.

Criteria to use in market segmentation may include:

- consumer needs
- benefits desired
- product/service usage
- attitude
- demographics
- lifestyle
- social and cultural factors
- business characteristics.

Demographic descriptions may include:

- date and place of birth
- sex

- nationality
- indigenous Australian
- education
- occupation
- marital status
- first language
- other languages spoken at home
- number and age of children
- income level
- disability.

Psychographic descriptions may include:

- activities
- interests
- opinions
- values
- attitudes
- lifestyle.

Relevant personnel may include:

- business owner/s
- management
- in-house or outsourced/contracted personnel
- technology personnel.

Effectiveness measures may include:

- awareness measurements
- recall measurements
- readership measurements
- media vehicle audience measurements
- opinion measurements
- attitude measurements
- inquiry measurements
- sales measurements
- customer satisfaction ratings.

Legal and ethical requirements may include:

- privacy
- confidentiality
- legislation
- regulations
- codes of practice
- ethical principles
- policies and guidelines
- society's expectations
- cultural expectations and influences
- social responsibilities eg protection of children, environmental issues.

## Evidence Guide

The Evidence Guide identifies the critical aspects, underpinning knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

### Essential Knowledge and Skills to Be Assessed

Knowledge and skills in the following areas must be assessed as part of this unit:

- relevant legislation from all levels of government that affects business operation, especially in regard to OH&S and environmental issues, equal opportunity, industrial relations and anti-discrimination
- marketing fundamentals
- e-business environment
- e-business terminology
- marketing applications for e-business
- electronic marketing research
- market segmentation
- influences on consumer behaviour
- legal and ethical requirements
- computer skills for online research
- literacy skills to interpret requirements and write marketing plan
- communication skills to negotiate contracts and implement marketing strategies
- ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities.

### Linkages to Other Units

This unit has linkages to the following unit/s and combined training and assessment may be appropriate:

- BSBEBUS522A Conduct e-marketing communications

### Critical Aspects of Assessment

Evidence of the following is critical:

- integrated demonstration of all elements of competency and their performance criteria
- effectiveness of marketing strategies to the target market
- realistic but challenging marketing objectives and plan.

### Context of Assessment and Resource Implications

Assessment must ensure:

- competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- assessment takes account of the endorsed assessment guidelines in the Business Services Training Package
- assessment of performance requirements in this unit is undertaken in an actual workplace or simulated environment
- assessment reinforces the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit
- the learner and trainer has access to appropriate documentation and resources normally used in the workplace

- in order to achieve consistency of performance, evidence is collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations.

### Assessment Methods

Assessment methods must be chosen to ensure that repair or servicing of a chassis can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- project to plan an e-marketing communications strategy and plan for an enterprise, including performance measures
- oral or written questions to assess knowledge of legal and ethical requirements, demographics for a business
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

### Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform Level 2 = Administer and Manage Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	3	Identifying and evaluating e-marketing opportunities Targeting e-marketing to particular audiences
Communicating Ideas and Information	3	Developing an e-marketing plan
Planning and Organising Activities	3	Researching target markets Developing and managing an e-marketing plan and strategies
Working with Others and in Teams	3	Preparing website marketing strategies
Using Mathematical Ideas and Techniques	1	Complying with time and budgetary requirements
Solving Problems	3	Determining marketing strategies to suit different target markets
Using Technology	2	Preparing planning documents

## BSBEBUS522A      Conduct e-marketing communications

### Unit Descriptor

This unit covers preparing advertisements for Internet, email or facsimile, using and evaluating the effectiveness of electronic marketing.

Consider co-assessment with BSBEBUS521A Plan e-marketing communications.

Element	Performance Criteria
<b>1      Prepare electronic advertisements</b>	<ul style="list-style-type: none"><li>1.1      The <i>media</i> for <i>electronic advertisements</i> are chosen in accordance with the marketing strategy and multiple channels are used to optimise marketing effort.</li><li>1.2      Copy and design elements communicate the required image, features and benefits of the products or services and/or of the business and suit the chosen media.</li><li>1.3      Each element of the advertisement is sized and positioned to achieve balance and focus for the advertisement.</li><li>1.4      Typeface selections suit the product and the central idea of the advertisement, and the layout balances white space and margins.</li><li>1.5      Sound, animation or graphics enhance and do not distract from the content of advertisements.</li><li>1.6      Advertisements meet the requirements of the marketing strategy and meets legal and ethical requirements.</li></ul>
<b>2      Use business website as e-marketing tool</b>	<ul style="list-style-type: none"><li>2.1      Website marketing objectives are determined in accordance with e-marketing strategy and plan.</li><li>2.2      Website design projects the required image of the business and conveys the features and benefits of the business' products or services.</li><li>2.3      Content, site map, navigation buttons, frames and multiple pages are determined in accordance with e-marketing strategy and plan.</li><li>2.4      Website incorporates data recording, contracts and feedback mechanisms to allow evaluation of the website as a marketing tool.</li></ul>

- |   |  |
|---|--|
| <b>3. Use electronic marketing</b>                    | <div>3.1 Media vehicles and website hotlinks are identified and contracts negotiated where necessary to meet the requirements of the marketing strategy, budget, and legal and ethical requirements.</div> <div>3.2 Marketing channels are promoted to target market segments.</div> <div>3.3 Advertisements are placed or disseminated in accordance with the marketing strategy, media contracts and <i>legal and ethical requirements</i>.</div>  |
| <b>4. Monitor and evaluate results of e-marketing</b> | <div>4.1 Marketing is monitored and errors or omissions are rectified in accordance with the marketing strategy.</div> <div>4.2 Effectiveness measures for the marketing strategy are monitored and results recorded in accordance with organisational requirements.</div> <div>4.3 The <i>effectiveness</i> of marketing campaigns is evaluated and the results used to review and improve the marketing strategy.</div> <div>4.4 Evaluation results and feedback on marketing channels are used to plan and improve future electronic marketing.</div> |

## Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace may include:

- award and enterprise agreements
- national, State/Territory legislative requirements especially in regard to OH&S
- industry codes of practice
- OECD International Guidelines for Consumer Protection in E-Commerce
- copyright laws
- defamation laws
- privacy legislation
- intellectual property, confidentiality requirements
- legal and regulatory policies affecting e-business.

Media for electronic advertisements may include:

- websites
- chat rooms
- email
- bulletins

- facsimiles.

Electronic advertisements may include:

- search engine submission
- FFA sites
- free/paid classifieds
- bulk email
- e-zine advertising
- e-zine publishing as a marketing tool
- news groups
- auto responders
- banner exchanges
- web rings.

Legal and ethical requirements may include:

- privacy
- confidentiality
- legislation
- regulations
- codes of practice
- ethical principles
- policies and guidelines
- society's expectations
- cultural expectations and influences
- social responsibilities eg protection of children, environmental issues.

Effectiveness measures may include:

- awareness measurements
- recall measurements
- readership measurements
- media vehicle audience measurements
- opinion measurements
- attitude measurements
- inquiry measurements
- sales measurements
- customer satisfaction ratings.

## **Evidence Guide**

The Evidence Guide identifies the critical aspects, underpinning knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

### **Essential Knowledge and Skills to Be Assessed**

Knowledge and skills in the following areas must be assessed as part of this unit:

- relevant legislation from all levels of government that affects business operation, especially in regard to OH&S and environmental issues, equal opportunity, industrial relations and anti-discrimination
- marketing fundamentals
- e-business environment
- e-business terminology

- marketing applications of e-business
- electronic marketing research
- market segmentation
- influences on consumer behaviour
- legal and ethical requirements
- computer skills for graphic design/multimedia
- literacy skills to interpret requirements and create e-advertisements
- communication skills to implement marketing strategies
- ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities.

### **Linkages to Other Units**

This unit has linkages to the following unit/s and combined training and assessment may be appropriate:

- BSBEBUS521A Plan e-marketing communications

### **Critical Aspects of Assessment**

Evidence of the following is critical:

- integrated demonstration of all elements of competency and their performance criteria
- targeting of marketing to different audiences
- effectiveness of marketing to target audiences.

### **Context of Assessment and Resource Implications**

Assessment must ensure:

- competency is demonstrated by performance of all state criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence guide, and within the scope as defined by the Range Statement
- assessment takes account of the endorsed assessment guidelines in the Business Services Training Package
- assessment of performance requirements in this unit is undertaken in an actual workplace or simulated environment
- assessment reinforces the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit.
- the learner and trainer have access to appropriate documentation and resources normally used in the workplace
- in order to achieve consistency of performance, evidence is collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations.

### **Assessment Methods**

Assessment methods must be chosen to ensure that repair or servicing of a chassis can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- preparation of a website and e-marketing materials including selection of appropriate information, typeface, graphics and visual effects appropriate for the product and business
- oral and written questions for ethical and legal responsibilities and considerations
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.



**Key Competencies in this Unit**

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform Level 2 = Administer and Manage Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	3	Targeting e-marketing to particular audiences
Communicating Ideas and Information	3	Communicating to stakeholders through e-marketing Preparing electronic advertisements to meet the target audience
Planning and Organising Activities	3	Managing e-marketing strategies Preparing, placing or disseminating advertisements
Working with Others and in Teams	3	Negotiating with stakeholders Liaising for media placement
Using Mathematical Ideas and Techniques	1	Complying with time and budgetary requirements
Solving Problems	3	Developing and implementing strategies Managing contingencies Identifying and rectifying errors of omissions
Using Technology	2	Creating and disseminating e-advertisements

## BSBEBUS401A      Conduct online research

### Unit Descriptor

This unit covers researching business information using Internet, intranet or extranet, communicating with team as required and presenting reports on research outcomes.

Consider co-assessment with BSBEBUS402A Implement e-correspondence policies and BSBEBUS403A Communicate electronically.

Element	Performance Criteria												
<b>1      Prepare self and/or others for online search</b>	<table><tr><td>1.1</td><td>Purpose and scope of the research brief are clarified and meet organisational requirements.</td></tr><tr><td>1.2</td><td>Research requirements for combining online research with non-electronic sources of information are identified and <i>communicated</i> as required.</td></tr><tr><td>1.3</td><td>Possible internal and external sources of online information are identified and communicated as required.</td></tr><tr><td>1.4</td><td>Search engines and databases relevant to research needs are identified to assist in online research.</td></tr><tr><td>1.5</td><td>Key elements of the research brief are identified to assist in online research.</td></tr><tr><td>1.6</td><td>Organisational requirements for reporting or presenting research results are confirmed.</td></tr></table>	1.1	Purpose and scope of the research brief are clarified and meet organisational requirements.	1.2	Research requirements for combining online research with non-electronic sources of information are identified and <i>communicated</i> as required.	1.3	Possible internal and external sources of online information are identified and communicated as required.	1.4	Search engines and databases relevant to research needs are identified to assist in online research.	1.5	Key elements of the research brief are identified to assist in online research.	1.6	Organisational requirements for reporting or presenting research results are confirmed.
1.1	Purpose and scope of the research brief are clarified and meet organisational requirements.												
1.2	Research requirements for combining online research with non-electronic sources of information are identified and <i>communicated</i> as required.												
1.3	Possible internal and external sources of online information are identified and communicated as required.												
1.4	Search engines and databases relevant to research needs are identified to assist in online research.												
1.5	Key elements of the research brief are identified to assist in online research.												
1.6	Organisational requirements for reporting or presenting research results are confirmed.												
<b>2      Research business information</b>	<table><tr><td>2.1</td><td>Websites and databases are identified using relevant search engines/information brokers/portals.</td></tr><tr><td>2.2</td><td><i>Key words and phrases</i> are identified for the search using logic and other research tools.</td></tr><tr><td>2.3</td><td>Websites are navigated and searches conducted using key words and phrases identified for the research topic.</td></tr><tr><td>2.4</td><td>Breadth and depth of research source/s meet the requirements of the research brief in terms of its scope and purpose.</td></tr><tr><td>2.5</td><td>Research is conducted in accordance with legal and ethical requirements.</td></tr></table>	2.1	Websites and databases are identified using relevant search engines/information brokers/portals.	2.2	<i>Key words and phrases</i> are identified for the search using logic and other research tools.	2.3	Websites are navigated and searches conducted using key words and phrases identified for the research topic.	2.4	Breadth and depth of research source/s meet the requirements of the research brief in terms of its scope and purpose.	2.5	Research is conducted in accordance with legal and ethical requirements.		
2.1	Websites and databases are identified using relevant search engines/information brokers/portals.												
2.2	<i>Key words and phrases</i> are identified for the search using logic and other research tools.												
2.3	Websites are navigated and searches conducted using key words and phrases identified for the research topic.												
2.4	Breadth and depth of research source/s meet the requirements of the research brief in terms of its scope and purpose.												
2.5	Research is conducted in accordance with legal and ethical requirements.												

- |   |   |
|---|---|
| <b>3. Locate and retrieve information</b> | <div>3.1 Information is located and assessed against <i>set criteria</i> in accordance with research requirements.</div> <div>3.2 Search results are analysed for sufficiency against the research brief and further research conducted where information is insufficient.</div> <div>3.3 Information is downloaded, printed or ordered in accordance with the requirements of the distributor and copyright owner and organisational requirements.</div>   |
| <b>4. Report online research results</b>  | <div>4.1 A <i>report or presentation</i> of the outcomes of online research is prepared in accordance with organisational requirements.</div> <div>4.2 Outcomes are reported with referenced material from the search/es integrated with non-electronic search results if applicable and sources documented in accordance with organisational requirements.</div> <div>4.3 Information is organised in a format suitable for use in accordance with organisational requirements.</div> <div>4.4 Legal requirements relating to copyright and protection of intellectual property are met.</div> |

## Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace may include:

- award and enterprise agreements
- national, State/Territory legislative requirements especially in regard to OH&S
- industry codes of practice
- copyright laws
- privacy legislation
- intellectual property, confidentiality requirements
- legal and regulatory policies affecting e-business.

Communication may include:

- instructions to work team.

Expert personnel may include:

- librarians
- senior staff

- information management staff
- help desk.

Business information may include:

- public information
- copyright information
- price lists
- catalogues
- technical information relating to products
- business opportunities
- electronic tendering opportunities
- government information
- legislation and regulations relating to running the business, human resource management, taxation etc
- statistical information
- market research data
- travel information
- banking information
- employment opportunities.

Websites and databases may include:

- Government online information services
- educational institutions' websites
- virtual business communities/networks
- industry websites
- value chain integrators eg recruitment websites, mortgage brokers websites
- archived material.

Search engines/information brokers may include:

- global Internet search engines
- Internet search engines focusing on particular locations eg Australia and New Zealand
- online market research organisations.

Key words and phrases may include:

- American spelling when searching
- cultural or geographic terms
- using different thesauri in different databases.

Legal and ethical requirements may include:

- the organisation's code of ethics
- policy and protocols for online use
- copyright and intellectual property protection laws and regulations
- Trade Practices Act.

Set criteria may include:

- relevance
- currency
- authenticity
- quality
- accuracy
- reliability

- validity
- reputability of source.

Reports or presentations may include:

- oral report
- written report
- electronic presentation
- copies of source documents
- comparative data
- information from non-electronic sources.

## **Evidence Guide**

The Evidence Guide identifies the critical aspects, underpinning knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

### **Essential Knowledge and Skills to Be Assessed**

Knowledge and skills in the following areas must be assessed as part of this unit:

- relevant legislation from all levels of government that affects business operation, especially in regard to OH&S and environmental issues, equal opportunity, industrial relations and anti-discrimination
- use of Internet/World Wide Web
- knowledge of the organisation's policies and procedures relating to use of Internet, intranet, extranet
- knowledge of service provider requirements especially with regard to downloading large files
- copyright and intellectual property requirements as they relate to online information
- online navigation tools
- electronic file handling (saving, copying, printing)
- OH&S requirements for working with computer technology
- basic computer skills
- literacy skills to determine key words, read and analyse information and follow policies and procedures
- numeracy skills to use logic theory such as Boolean logic and other tools
- communication skills to report or present information resulting from research
- report writing skills
- ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities.

### **Linkages to Other Units**

This unit has linkages to the following unit/s and combined training and assessment may be appropriate:

- BSBEBUS402A Implement e-correspondence policies
- BSBEBUS403A Communicate electronically

### **Critical Aspects of Assessment**

Evidence of the following is critical:

- integrated demonstration of all elements of competency and their performance criteria
- knowledge of the organisation's policies and procedures relating to electronic access to Internet, intranet and/or extranet

- retrieval of information complies with legal and ethical requirements.

### Context of Assessment and Resource Implications

Assessment must ensure:

- competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- assessment takes account of the endorsed assessment guidelines in the Business Services Training Package
- assessment of performance requirements in this unit is undertaken in an actual workplace or simulated environment
- assessment reinforces the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit
- the learner and trainer have access to appropriate documentation and resources normally used in the workplace
- in order to achieve consistency of performance, evidence is collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations.

### Assessment Methods

Assessment methods must be chosen to ensure that repair or servicing of a chassis can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- project to conduct research on a particular topic using a range of online tools and strategies
- oral or written questions to assess knowledge and awareness of search tools, available databases and websites, information brokers and portals, ethical and legal requirements, organisational policies and procedures relating to Internet access
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

### Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform Level 2 = Administer and Manage Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	2	Researching business websites Analysing, preparing and presenting the results of online research
Communicating Ideas and Information	2	Clarifying purpose and scope of research brief and reporting/presenting research outcomes
Planning and Organising Activities	2	Preparing for and conducting online research Analysing and evaluating research and reporting on results

Working with Others and in Teams	1	Clarifying key elements of research brief Identifying information sources and reporting on results
Using Mathematical Ideas and Techniques	2	Determining search criteria/key words using logic theory and other tools
Solving Problems	2	Identifying sufficiency of results, evaluating results and conducting further research
Using Technology	2	Conducting online research

## BSBEBUS516A      Manage online purchasing

### Unit Descriptor

This unit covers evaluation of online purchasing methods, development and implementation of a business-to-business purchasing strategy and monitoring and review of online purchasing in the business.

Consider co-assessment with BSBEBUS509A Implement e-business outsourcing arrangements, BSBEBUS510A Manage e-business outsourcing, BSBEBUS519A Manage online sales systems and BSBEBUS520A Manage online payments systems.

Element	Performance Criteria
<b>1      Evaluate online purchasing methods</b>	<p>1.1      The e-business environment for business-to-business purchasing is investigated and <i>online purchasing methods</i> identified.</p> <p>1.2      Purchasing methods suited to the business and its strategic direction are identified and ranked in terms of their likely fit with business direction and processes.</p> <p>1.3      <i>Security issues</i> are evaluated for highly ranked online purchasing methods and rated in terms of acceptable risk.</p> <p>1.4      Technology requirements for online purchasing are evaluated in terms of the organisation's requirements and that of the e-business supply chain.</p>



- |  |   |
|--|---|
| <b>2     Develop a business-to-business online purchasing strategy</b>   | <ul style="list-style-type: none"><li>2.1     The strategy identifies online purchasing methods for the business and related technology that meet short and long term organisational requirements and budget.</li><li>2.2     Management of security issues surrounding online purchasing are addressed in the online purchasing strategy.</li><li>2.3     The strategy addresses mechanisms for managing online purchasing in an environment of disparate technology capability among organisations in the supply chain.</li><li>2.4     The strategy identifies change management, <i>information, learning and development requirements</i> for staff and supply chain organisations to facilitate the operation of online purchasing.</li><li>2.5     The strategy identifies targets for online purchasing relating to cost savings, efficiency gains and value for money.</li><li>2.6     The strategy addresses record keeping requirements <i>legal and ethical issues</i> related to business-to-business online purchasing.</li></ul> |
| <b>3.    Implement a business-to-business online purchasing strategy</b> | <ul style="list-style-type: none"><li>3.1     Responsibility for online purchasing within the organisation is assigned in accordance with the purchasing strategy.</li><li>3.2     Technology and training for implementation of business-to-business online purchasing are provided in accordance with the online purchasing strategy.</li><li>3.3     Online purchasing procedures are implemented in accordance with the online purchasing strategy and legal and ethical requirements.</li><li>3.4     Security procedures and protocols are developed and implemented in accordance with the online purchasing strategy.</li><li>3.5     Necessary records to support online purchasing are maintained in accordance with the online purchasing strategy, accounting requirements and management information system.</li></ul>   |

- |  |  |     |   |     |  |     |  |     |   |
|--|--|-----|---|-----|--|-----|--|-----|---|
| <b>4. Monitor and review online purchasing</b> | <table border="0"><tr><td style="vertical-align: top; padding-right: 10px;">4.1</td><td>Online purchasing and its outcomes are monitored, and processes adjusted in response to contingencies in accordance with the online purchasing strategy and level of authority.</td></tr><tr><td style="vertical-align: top; padding-right: 10px;">4.2</td><td>Implementation of the online purchasing strategy is reviewed in accordance with performance monitoring and reporting requirements.</td></tr><tr><td style="vertical-align: top; padding-right: 10px;">4.3</td><td>Business data and reports are used to compare plans, budgets, timelines and forecasts to actual performance.</td></tr><tr><td style="vertical-align: top; padding-right: 10px;">4.4</td><td>Feedback is obtained from users and personnel responsible for online purchasing, and recommendations made to improve future online purchasing strategies and to monitor supplier performance in accordance with service level agreements.</td></tr></table> | 4.1 | Online purchasing and its outcomes are monitored, and processes adjusted in response to contingencies in accordance with the online purchasing strategy and level of authority. | 4.2 | Implementation of the online purchasing strategy is reviewed in accordance with performance monitoring and reporting requirements. | 4.3 | Business data and reports are used to compare plans, budgets, timelines and forecasts to actual performance. | 4.4 | Feedback is obtained from users and personnel responsible for online purchasing, and recommendations made to improve future online purchasing strategies and to monitor supplier performance in accordance with service level agreements. |
| 4.1  | Online purchasing and its outcomes are monitored, and processes adjusted in response to contingencies in accordance with the online purchasing strategy and level of authority.  |     |   |     |  |     |  |     |   |
| 4.2  | Implementation of the online purchasing strategy is reviewed in accordance with performance monitoring and reporting requirements.   |     |   |     |  |     |  |     |   |
| 4.3  | Business data and reports are used to compare plans, budgets, timelines and forecasts to actual performance.   |     |   |     |  |     |  |     |   |
| 4.4  | Feedback is obtained from users and personnel responsible for online purchasing, and recommendations made to improve future online purchasing strategies and to monitor supplier performance in accordance with service level agreements.  |     |   |     |  |     |  |     |   |

## Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace may include:

- award and enterprise agreements
- national, State/Territory legislative requirements especially in regard to OH&S
- industry codes of practice
- OECD International Guidelines for Consumer Protection in E-Commerce
- copyright laws
- privacy legislation
- intellectual property, confidentiality requirements
- legal and regulatory policies affecting e-business.

E-business is:

- every type of business transaction in which the participants (i.e suppliers, end users etc.) prepare or transact business or conduct their trade in goods or services electronically (Definition of e-commerce in E-competent Australia, ANTA, May 2000).

Online purchasing may include:

- buying from electronic catalogues
- electronic tendering
- e-auctions
- reverse auctions.

Online purchasing methods may include:

- electronic data interchange
- Internet-based transactions

- online ordering and payment
- online ordering and off-line payment.

Security issues may include:

- security
- privacy
- confidentiality
- information management
- risk management
- intellectual property
- fraud prevention and detection
- business ethics
- legal issues eg jurisdiction, contract validity, taxation.

Information and development support may include:

- advice on technology issues/compatibility
- protocols for electronic data interchange
- protocols relating to legal or security issues
- personal identification and password for online access
- contact person
- advice on staffing arrangements
- online tips for data entry – help.

Legal and ethical issues may include:

- privacy legislation
- confidentiality of records and information
- intellectual property
- fraud prevention and detection
- Trade Practices Act.

## **Evidence Guide**

The Evidence Guide identifies the critical aspects, underpinning knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

### **Essential Knowledge and Skills to Be Assessed**

Knowledge and skills in the following areas must be assessed as part of this unit:

- relevant legislation from all levels of government that affects business operation, especially in regard to OH&S and environmental issues, equal opportunity, industrial relations and anti-discrimination
- online purchasing methods
- security issues related to online purchasing
- technology requirements for online purchasing
- legal and ethical requirements for online purchasing
- business case/plan to sell/recognise benefits
- tender process and evaluating vendors
- computer technology skills
- literacy skills to investigate the online purchasing environment and prepare the strategy
- communication skills to monitor the effectiveness of the online purchasing strategy
- numeracy skills to estimate cost savings

- ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities.

### **Linkages to Other Units**

This unit has linkages to the following unit/s and combined training and assessment may be appropriate:

- BSBEBUS509A Implement e-business outsourcing arrangements
- BSBEBUS510A Manage e-business outsourcing
- BSBEBUS519A Manage online sales systems
- BSBEBUS520A Manage online payments systems

### **Critical Aspects of Assessment**

Evidence of the following is critical:

- integrated demonstration of all elements of competency and their performance criteria
- explanation of security measures and how they meet the needs of the organisation
- a purchasing strategy that meets the needs of the organisation and the supply chain.

### **Context of Assessment and Resource Implications**

Assessment must ensure:

- competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- assessment takes account of the endorsed assessment guidelines in the Business Services Training Package
- assessment of performance requirements in this unit is undertaken in an actual workplace or simulated environment
- assessment reinforces the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit
- the learner and trainer have access to appropriate documentation and resources normally used in the workplace
- in order to achieve consistency of performance, evidence is collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations.

### **Assessment Methods**

Assessment methods must be chosen to ensure that repair or servicing of a chassis can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- project to evaluate, develop and implement and monitor and review an online purchasing system for a particular enterprise over a period of time
- project to develop security procedures and protocols in accordance with the online purchasing strategy
- oral or written questions to assess knowledge and awareness of security measures and how they meet the needs of the enterprise
- evaluation of strategies prepared by the candidate, that meet short and long term organisational budgets for different purposes
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

**Key Competencies in this Unit**

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform Level 2 = Administer and Manage Level 3 = Design and Evaluate

<b>Key Competencies</b>	<b>Level</b>	<b>Examples</b>
Collecting, Organising and Analysing Information	3	Investigating, evaluating, designing and setting up procedures for business-to-business online purchasing methods
Communicating Ideas and Information	3	Ensuring stakeholders are informed through an online purchasing strategy
Planning and Organising Activities	3	Implementing on-line purchasing procedures, in regard to record keeping and security procedures and protocols
Working with Others and in Teams	3	Providing information to stakeholders Providing learning and development opportunities for suppliers and staff
Using Mathematical Ideas and Techniques	2	Comparing business data and reports Estimating cost savings
Solving Problems	3	Designing and implementing the system Adjusting processes to manage contingencies and change
Using Technology	1	Facilitating analysis, evaluation and implementation of current situation and design of future options

## BSBEBUS517A      Manage online inventory

### Unit Descriptor

This unit covers choosing an online inventory management model for the business, sourcing inventory, monitoring and maintaining inventory.

Element	Performance Criteria
<b>1      Set up online inventory arrangements</b>	<p>1.1      Organisational <i>requirements for inventory</i> are identified in consultation with relevant personnel.</p> <p>1.2      Online <i>inventory management models</i> are investigated and the risks, advantages and disadvantages of each are compared with organisational requirements.</p> <p>1.3      The costs and technology requirements associated with online inventory management models are evaluated in relation to organisational requirements.</p> <p>1.4      An inventory management model is chosen in accordance with organisational requirements and arrangements negotiated with service providers/suppliers to implement the model.</p> <p>1.5      Technology and standards for the exchange of business data are confirmed and arranged with online inventory management organisation.</p>
<b>2      Implement strategic sourcing of inventory</b>	<p>2.1      Inventory demands are estimated and sources of inventory identified and accessed in accordance with organisational requirements.</p> <p>2.2      Inventory supply is negotiated with suppliers or fulfilment organisation/s to ensure availability in accordance with contractual arrangements.</p>

- |   |  |     |  |     |  |     |  |     |  |
|---|--|-----|--|-----|--|-----|--|-----|--|
| <b>3. Implement virtual warehousing practices</b> | <table border="0"><tr><td style="vertical-align: top; padding-right: 10px;">3.1</td><td>Inventory is monitored online, and online catalogue information is reviewed and updated.</td></tr><tr><td style="vertical-align: top; padding-right: 10px;">3.2</td><td>Order fulfilment and back ordering are monitored to identify supply time and manage contingencies.</td></tr><tr><td style="vertical-align: top; padding-right: 10px;">3.3</td><td>Automatic reordering system is implemented using online technologies in accordance with pre-set inventory level.</td></tr><tr><td style="vertical-align: top; padding-right: 10px;">3.4</td><td>Electronic data interchange is utilised in accordance with inventory management model and security procedures.</td></tr></table> | 3.1 | Inventory is monitored online, and online catalogue information is reviewed and updated. | 3.2 | Order fulfilment and back ordering are monitored to identify supply time and manage contingencies. | 3.3 | Automatic reordering system is implemented using online technologies in accordance with pre-set inventory level. | 3.4 | Electronic data interchange is utilised in accordance with inventory management model and security procedures. |
| 3.1   | Inventory is monitored online, and online catalogue information is reviewed and updated.   |     |  |     |  |     |  |     |  |
| 3.2   | Order fulfilment and back ordering are monitored to identify supply time and manage contingencies.   |     |  |     |  |     |  |     |  |
| 3.3   | Automatic reordering system is implemented using online technologies in accordance with pre-set inventory level.   |     |  |     |  |     |  |     |  |
| 3.4   | Electronic data interchange is utilised in accordance with inventory management model and security procedures.   |     |  |     |  |     |  |     |  |

### Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace may include:

- award and enterprise agreements
- national, State/Territory legislative requirements especially in regard to OH&S
- industry codes of practice
- OECD International Guidelines for Consumer Protection in E-Commerce
- copyright laws
- privacy legislation
- intellectual property, confidentiality requirements
- legal and regulatory policies affecting e-business.

E-business is:

- every type of business transaction in which the participants (i.e suppliers, end users etc.) prepare or transact business or conduct their trade in goods or services electronically (Definition of e-commerce in E-competent Australia, ANTA, May 2000).

Requirements for inventory may include:

- technology
- cost
- vendor managed inventory (VMI)
- outsourcing to third parties specialising in e-business fulfilment
- just-in-time availability of inventory
- limited or no inventory costs
- drop shipping services
- effect on margins
- guaranteed quality customer service
- immediate order fulfilment
- perfect order fulfilment.

Inventory management model may include:

- e-business fulfilment

- drop-shipping
- vendor managed inventory
- supplier managed inventory
- supplier consignment inventory close to customer
- traditional inventory model.

## **Evidence Guide**

The Evidence Guide identifies the critical aspects, underpinning knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

## **Essential Knowledge and Skills to Be Assessed**

Knowledge and skills in the following areas must be assessed as part of this unit:

- relevant legislation from all levels of government that affects business operation, especially in regard to OH&S and environmental issues, equal opportunity, industrial relations and anti-discrimination
- e-business
- e-business terminology
- online inventory management models
- virtual warehousing
- electronic data interchange (EDI)
- computer technology skills
- literacy skills to source inventory
- communication skills to negotiate online inventory management arrangements
- numeracy skills to monitor inventory
- ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities.

## **Linkages to Other Units**

This unit has linkages to the following unit/s and combined training and assessment may be appropriate:

- THHGLE17B Manage and purchase stock.

## **Critical Aspects of Assessment**

Evidence of the following is critical:

- integrated demonstration of all elements of competency and their performance criteria
- inventory management model is suited to available technology and organisation's products.

## **Context of Assessment and Resource Implications**

Assessment must ensure:

- competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
- assessment takes account of the endorsed assessment guidelines in the Business Services Training Package
- assessment of performance requirements in this unit is undertaken in an actual workplace or simulated environment



- assessment reinforces the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit
- the learner and trainer have access to appropriate documentation and resources normally used in the workplace
- in order to achieve consistency of performance, evidence is collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations.

### Assessment Methods

Assessment methods must be chosen to ensure that repair or servicing of a chassis can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- project or work activities to set up and monitor a virtual warehouse for a range of enterprise products over a period of time
- project to develop an inventory management model and negotiate arrangements with service providers/suppliers to implement
- evaluation of documents produced by the candidate related to inventory review, order fulfilment, back ordering, supply time and managing associated contingencies for these
- oral or written questions to assess knowledge and awareness of legislation related to consumer protection, copyright and privacy and confidentiality
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

### Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform Level 2 = Administer and Manage Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	3	Identifying organisational requirements Investigating online inventory management models to design a best practise model for the organisation
Communicating Ideas and Information	3	Negotiating online inventory management model arrangements with stakeholders Facilitating training as required
Planning and Organising Activities	3	Implementing inventory managements model for the organisation Managing contingencies as they occur
Working with Others and in Teams	2	Negotiating with supplier Monitoring inventory
Using Mathematical Ideas and Techniques	3	Estimating inventory demands
Solving Problems	3	Enabling perfect order fulfilment
Using Technology	2	Managing online inventory

## BSBEBUS519A      Manage online sales systems

### Unit Descriptor

This unit covers development and implementation of an e-business selling strategy and the monitoring and review of online selling in the business.

Consider co-assessment with BSBEBUS516A Manage online purchasing and BSBEBUS520A Manage online payments systems.

Element	Performance Criteria												
<b>1      Develop and online selling strategy</b>	<table><tr><td>1.1</td><td>Technology and record keeping requirements of online selling are identified and detailed as part of the online selling strategy.</td></tr><tr><td>1.2</td><td>The <i>security risks</i> in online selling are evaluated and strategies to address them identified in the strategy in accordance with legal and ethical requirements.</td></tr><tr><td>1.3</td><td>Customers and the <i>supply chain</i> for online selling are identified in the strategy, each organisation's technology capability is confirmed and supply chain management planned.</td></tr><tr><td>1.4</td><td>Specifications for the preparation of an <i>online catalogue</i> are prepared in accordance with organisational policy and procedures.</td></tr><tr><td>1.5</td><td>The strategy identifies e-marketing requirements for the launch of the catalogue and the selling strategy.</td></tr><tr><td>1.6</td><td>The strategy identifies objectives, targets, performance measures and staff training for online selling in accordance with the overall e-business strategy.</td></tr></table>	1.1	Technology and record keeping requirements of online selling are identified and detailed as part of the online selling strategy.	1.2	The <i>security risks</i> in online selling are evaluated and strategies to address them identified in the strategy in accordance with legal and ethical requirements.	1.3	Customers and the <i>supply chain</i> for online selling are identified in the strategy, each organisation's technology capability is confirmed and supply chain management planned.	1.4	Specifications for the preparation of an <i>online catalogue</i> are prepared in accordance with organisational policy and procedures.	1.5	The strategy identifies e-marketing requirements for the launch of the catalogue and the selling strategy.	1.6	The strategy identifies objectives, targets, performance measures and staff training for online selling in accordance with the overall e-business strategy.
1.1	Technology and record keeping requirements of online selling are identified and detailed as part of the online selling strategy.												
1.2	The <i>security risks</i> in online selling are evaluated and strategies to address them identified in the strategy in accordance with legal and ethical requirements.												
1.3	Customers and the <i>supply chain</i> for online selling are identified in the strategy, each organisation's technology capability is confirmed and supply chain management planned.												
1.4	Specifications for the preparation of an <i>online catalogue</i> are prepared in accordance with organisational policy and procedures.												
1.5	The strategy identifies e-marketing requirements for the launch of the catalogue and the selling strategy.												
1.6	The strategy identifies objectives, targets, performance measures and staff training for online selling in accordance with the overall e-business strategy.												

- |   |   |
|---|---|
| <b>2 Implement an online selling strategy</b> | <ul style="list-style-type: none"><li>2.1 Online selling budget is prepared and resources and <i>processes</i> identified for implementation of the strategy.</li><li>2.2 Responsible personnel are identified and prepared for online selling.</li><li>2.3 Security procedures and protocols are developed and implemented in accordance with the online selling strategy.</li><li>2.4 Preparation (non-technical) and launch of the online catalogue is managed in accordance with the online selling strategy.</li><li>2.5 Prices and payment methods offered to customers are matched to the selling strategy in accordance with organisational policy and legal and ethical requirements.</li><li>2.6 Necessary records to support online selling are maintained in accordance with the online selling strategy and accounting requirements.</li></ul> |
| <b>3. Monitor and review online selling</b>   | <ul style="list-style-type: none"><li>3.1 Online sales are monitored and the online catalogue is maintained (non-technical) and updated in response.</li><li>3.2 Online selling processes are adjusted in response to contingencies in accordance with the online selling strategy and level of authority.</li><li>3.3 Implementation of the online selling strategy is reviewed in accordance with performance monitoring and reporting requirements.</li><li>3.4 Business data and reports are used to compare objectives, targets and performance measures to actual performance.</li><li>3.5 Feedback is obtained from customers, users and personnel responsible for online selling, and recommendations are made to improve future online selling strategies.</li></ul>   |

## Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace may include:

- award and enterprise agreements
- national, State/Territory legislative requirements especially in regard to OH&S
- industry codes of practice
- OECD International Guidelines for Consumer Protection in E-Commerce
- copyright laws
- privacy legislation
- intellectual property, confidentiality requirements
- legal and regulatory policies affecting e-business.

E-business is:

- every type of business transaction in which the participants (i.e suppliers, end users etc.) prepare or transact business or conduct their trade in goods or services electronically (Definition of e-commerce in E-competent Australia, ANTA, May 2000).

Security risks may include:

- fraud
- legal issues eg jurisdiction, contract validity, taxation
- insecure technology systems
- unprotected information or data
- insecure premises.

Supply chain may include:

- the entire cycle from raw materials to producers, component suppliers, manufacturers, wholesalers, 3<sup>rd</sup> party service providers, retailers, customers and recyclers, plus freight, distribution and cash flow.

Online catalogue may include:

- public sections
- private personalised sections with only authorised access
- sales products, specifications, pricing
- interactive pages
- thumbnails, movies, photos, graphics, sound etc.

Online selling processes may include:

- processing online orders
- ensuring fulfilment of order placed online
- customer service
- relationship management.

## **Evidence Guide**

The Evidence Guide identifies the critical aspects, underpinning knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

### **Essential Knowledge and Skills to Be Assessed**

Knowledge and skills in the following areas must be assessed as part of this unit:

- relevant legislation from all levels of government that affects business operation, especially in regard to OH&S and environmental issues, equal opportunity, industrial relations and anti-discrimination
- online selling strategies

- online catalogues
- security issues related to online selling
- technology requirements for online selling
- legal and ethical requirements of online pricing and selling
- computer technology skills
- literacy skills to prepare online selling strategy
- communication skills to monitor the effectiveness of the online selling strategy
- numeracy skills to oversee pricing
- ability to relate to stakeholders from a range of social, cultural and ethnic backgrounds and physical and mental abilities.

### **Linkages to Other Units**

This unit has linkages to the following unit/s and combined training and assessment may be appropriate:

- BSBEBUS516A Manage online purchasing
- BSBEBUS520A Manage online payments systems.

### **Critical Aspects of Assessment**

Evidence of the following is critical:

- integrated demonstration of all elements of competency and their performance criteria
- sales strategy and online catalogue that meets the organisation's targets and objectives.

### **Context of Assessment and Resource Implications**

Assessment must ensure:

- competency is demonstrated by performance of all state criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence guide, and within the scope as defined by the Range Statement
- assessment takes account of the endorsed assessment guidelines in the Business Services Training Package
- assessment of performance requirements in this unit is undertaken in an actual workplace or simulated environment
- assessment reinforces the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit.
- the learner and trainer have access to appropriate documentation and resources normally used in the workplace
- in order to achieve consistency of performance, evidence is collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations.
- to include dealings with an appropriate range and variety of situations.

### **Assessment Methods**

Assessment methods must be chosen to ensure that repair or servicing of a chassis can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- project to develop an online sales strategy including identification of customers and the supply chain, specifications for the preparation of an online catalogue, e-marketing requirements for the launch of the catalogue and the selling strategy for a particular enterprise

- oral or written questions to assess knowledge and awareness of prices and payment methods, security procedures and protocols and any policy, legal, ethical and accounting requirements which affect the strategy for an enterprise
- reports prepared by the candidate to compare objectives, targets and performance measures against the actual performance of the online selling strategy
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

### Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform Level 2 = Administer and Manage Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	3	Identifying technology and record keeping requirements of online selling
Communicating Ideas and Information	3	Using an online selling strategy Identifying and encouraging business enabled by new capabilities which may become available
Planning and Organising Activities	3	Managing online sales policies and procedures Managing the launch of an online
Working with Others and in Teams	3	Developing and training staff Implementing and monitoring an online selling strategy
Using Mathematical Ideas and Techniques	2	Setting sales targets and monitoring performance against them
Solving Problems	3	managing the on-line sales process Evaluating the current situation Positioning the business to take advantage of new sales opportunities Maintaining the update of the online catalogue in response to online sales
Using Technology	2	Selling online

## **BSBEBUS520A      Manage online payments systems**

### **Unit Descriptor**

This unit covers evaluation of online payment system/s, determining appropriate online payment system/s for the business and integrating, monitoring and reviewing the online payment system/s.

Consider co-assessment with BSBEBUS516A Manage online purchasing and BSBEBUS519A Manage online sales systems.

<b>Element</b>	<b>Performance Criteria</b>
<b>1      Evaluate online payment systems</b>	<ul style="list-style-type: none"><li>1.1      The <i>organisational requirements</i> of an online payment system are identified in consultation with relevant personnel.</li><li>1.2      The features of online payment systems are investigated and their relevance to the e-business established.</li><li>1.3      Security risks inherent in online payments are identified and their management in payment systems evaluated.</li><li>1.4      Suitable online payment systems are identified and their costs and benefits analysed.</li><li>1.5      Technology requirements of online payment systems are identified and compared.</li><li>1.6      Online payment system for the business is determined to meet organisational and budgetary requirements.</li></ul>

- |  |  |
|--|--|
| <b>2 Integrate online payment system/s into the business</b> | 2.1 Responsibility for online payment system within the organisation is assigned in accordance with the organisational policy and procedures.<br><br>2.2 Technology and training for implementation of online payment system are provided in accordance with the e-business strategy.<br><br>2.3 Business procedures for the online payment system are developed and implemented in accordance with legal, ethical and accounting requirements.<br><br>2.4 <i>Security procedures and protocols</i> are developed and implemented in accordance with the organisational requirements.<br><br>2.5 Online payment system records are maintained in accordance with legal, ethical and accounting requirements. |
| <b>3. Monitor and review online payment system/s</b>         | 3.1 Online payment system is monitored and processes adjusted in response to contingencies in accordance with organisational policy and procedures and level of authority.<br><br>3.2 Feedback is obtained from customers and staff on usability of the online payment system and recommendations are made to improve processes and user interface.  |

## Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace may include:

- award and enterprise agreements
- national, State/Territory legislative requirements especially in regard to OH&S
- industry codes of practice
- OECD International Guidelines for Consumer Protection in E-Commerce
- copyright laws
- privacy legislation
- intellectual property, confidentiality requirements
- legal and regulatory policies affecting e-business.

e-business is:



every type of business transaction in which the participants (i.e suppliers, end users etc.) prepare or transact business or conduct their trade in goods or services electronically (Definition of e-commerce in E-competent Australia, ANTA, May 2000).

Organisational requirements may include:

- recognised Internet Service Provider (ISP) with secure platform
- Secure web server and browser with SSL (secure sockets layer)
- firewalls
- encryption technology
- gatekeeper software
- building security
- confidentiality
- privacy
- fraud control
- authentication
- third party verification of credit card information
- cost.

Security procedures and protocols may include:

- authentication – confirmation of identity
- establishing and/or monitoring the credit worthiness of clients
- processes for preventing fraudulent use of credit cards
- processes for minimising bad debts through online payments.

## **Evidence Guide**

The Evidence Guide identifies the critical aspects, underpinning knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

### **Essential Knowledge and Skills to Be Assessed**

Knowledge and skills in the following areas must be assessed as part of this unit:

- relevant legislation from all levels of government that affects business operation, especially in regard to OH&S and environmental issues, equal opportunity, industrial relations and anti-discrimination
- online payment systems
- security issues for online financial transactions
- accounting requirements for online payment systems
- business processes related to payment systems
- literacy skills to identify features of different online payment systems
- numeracy skills to interpret accounting requirements for online payment systems
- computer technology skills
- ability to relate to stakeholders from a range of social, cultural and ethnic backgrounds and physical and mental abilities.

### **Linkages to Other Units**

This unit has linkages to the following unit/s and combined training and assessment may be appropriate:

- BSBEBUS516A Manage online purchasing
- BSBEBUS519A Manage online sales systems

### **Critical Aspects of Assessment**

Evidence of the following is critical:

- integrated demonstration of all elements of competency and their performance criteria
- security of payment system to deliver outcomes to the organisation and the users.

### **Context of Assessment and Resource Implications**

Assessment must ensure:

- competency is demonstrated by performance of all state criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence guide, and within the scope as defined by the Range Statement
- assessment takes account of the endorsed assessment guidelines in the Business Services Training Package
- assessment of performance requirements in this unit is undertaken in an actual workplace or simulated environment
- assessment reinforces the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit.
- the learner and trainer have access to appropriate documentation and resources normally used in the workplace
- in order to achieve consistency of performance, evidence is collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations.

### **Assessment Methods**

Assessment methods must be chosen to ensure that repair or servicing of a chassis can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- project or work activities to secure a web server and browser for online payments for a business
- oral or written questions to assess knowledge and awareness of security procedures and protocols, technology requirements, budgetary requirements and security risks,
- report and recommendations developed by the candidate based on feedback from customers and staff on the effectiveness of the system
- evaluation of guidelines prepared by the candidate for the appropriate technology and training or policies and procedures for levels of authority, for implementation of the online payment system
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

**Key Competencies in this Unit**

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform Level 2 = Administer and Manage Level 3 = Design and Evaluate

<b>Key Competencies</b>	<b>Level</b>	<b>Examples</b>
Collecting, Organising and Analysing Information	3	Determining features of online payment systems Setting up a system suitable for the business
Communicating Ideas and Information	3	Implementing security requirements for online payment systems
Planning and Organising Activities	3	Implementing procedures and protocols for online payments
Working with Others and in Teams	3	Providing information and training on online payment systems
Using Mathematical Ideas and Techniques	2	Complying with accounting requirements of online payment systems
Solving Problems	3	Managing contingencies related to online payment systems
Using Technology	2	Managing online payment systems

## BSBEBUS404A      Trade online

### Unit Descriptor

This unit covers assessment of suppliers, ordering, purchasing, selling or exchanging business goods and services online including the use of electronic shopping agents, reverse markets and auctions.

This unit is related to BSBEBUS304A Buy online, BSBEBUS305A Sell online and BSBEBUS306A Make payments online. Consider co-assessment with BSBEBUS405A Conduct online financial transactions and BSBEBUS408A Implement and monitor delivery of quality customer service online.

Element	Performance Criteria
<b>1      Assess suppliers and purchase online</b>	<p>1.1      Off and online research is conducted to identify <i>sources/suppliers</i> for required <i>products</i> in accordance with requirements for quality, budget and timeframes.</p> <p>1.2      Potential suppliers are assessed for authenticity, reliability and financial stability.</p> <p>1.3      <i>Payment</i> and <i>fulfilment options</i> are assessed and chosen for reliability and security in accordance with organisational requirements.</p> <p>1.4      Value for money comparisons are made and products ordered in accordance with organisational requirements.</p> <p>1.5      Purchase is completed and products received in accordance with the terms of the purchase order.</p>

- |  |   |
|--|---|
| <b>2     Implement online payment procedures</b> | <ul style="list-style-type: none"><li>2.1     Security, confidentiality and privacy aspects of online bill paying facilities are assessed in accordance with individual and organisational requirements.</li><li>2.2     Authentication information is secured in accordance with organisational requirements and used to access online bill-paying facilities.</li><li>2.3     Payments are made in accordance with financial controls, security procedures and level of authority.</li><li>2.4     Records of payments are maintained in accordance with organisational requirements for accounting purposes.</li><li>2.5     Organisational records are reconciled with online bill paying transaction records, and irregularities dealt with in accordance with organisational policy and procedures.</li></ul> |
| <b>3.    Use an electronic shopping agent</b>    | <ul style="list-style-type: none"><li>3.1     Purchasing specifications are determined and documented in accordance with organisational requirements.</li><li>3.2     Specifications include <i>vendor options</i> for quality and quantity, value for money criteria, security and time requirements.</li><li>3.3     Specifications are provided to shopping agent and commission or other payment options confirmed.</li><li>3.4     Shopping agent arrangements are monitored over time to ensure organisational requirements are met and action is taken to address performance gaps.</li></ul>  |

- |   |   |
|---|---|
| <b>4. Participate in an e-auction/reverse auction</b> | <p>4.1 Organisational requirements are confirmed for products to be procured through e-auction or reverse auction.</p> <p>4.2 Bidding ceiling and level of authority for decision making is confirmed in accordance with organisational requirements.</p> <p>4.3 e-auction arrangements and documentation for bidding, contracting, payment and delivery are identified and confirmed as meeting organisational requirements.</p> <p>4.4 Auction items are assessed for suitability against organisational requirements.</p> <p>4.5 Bids are made and transactions completed in accordance with level of authority, bidding ceiling, legal and organisational requirements.</p> |
| <b>5. Sell or exchange goods/services online</b>      | <p>5.1 <i>Products</i> to be sold or exchanged are identified, priced and catalogued in accordance with organisational requirements.</p> <p>5.2 Trading, advertising, supply, delivery, warranty and service arrangements are negotiated with website provider in accordance with organisational requirements.</p> <p>5.3 Products are advertised and supplied in accordance with negotiated terms and conditions and organisational requirements.</p> <p>5.4 Goods are sold or exchanged and any after sales requirements met in accordance with organisational guidelines.</p>  |

## Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace may include:

- award and enterprise agreements
- national, State/Territory legislative requirements especially in regard to OH&S
- industry codes of practice
- OECD International Guidelines for Consumer Protection in E-Commerce
- copyright laws
- defamation laws
- privacy legislation

- intellectual property, confidentiality requirements
- legal and regulatory policies affecting e-business.

Online sources may include:

- e-shop
- e-mall
- e-brokerage service
- e-procurement service
- third party market place
- e-auction.

Products may include:

- goods
- services
- shares
- insurance
- loans
- financial services.

Payment options may include:

- online payment using credit card, debit card, electronic funds transfer, digital signature
- off-line payment eg credit card authorised via telephone or facsimile, mailed cheque, over the counter.

Fulfilment options may include:

- direct delivery by online provider
- delivery by off-line supplier
- delivery by post, courier or other third party
- download of electronic information
- electronic delivery of digitised information, software, books etc.

Vendor options may include:

- larger quantities of lower quality items
- lower cost for larger quantities
- higher cost for immediate delivery
- lower cost for items that meet minimum (but not all) requirements.

## **Evidence Guide**

The Evidence Guide identifies the critical aspects, underpinning knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

### **Essential Knowledge and Skills to Be Assessed**

Knowledge and skills in the following areas must be assessed as part of this unit:

- relevant legislation from all levels of government that affects business operation, especially in regard to OH&S and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Internet/World Wide Web
- knowledge of the organisation's policies and procedures relating to use of Internet and online trade

- knowledge of service provider requirements
- copyright, intellectual property and proof of ownership requirements relating to online trade
- online navigation tools
- OH&S requirements for working with computer technology
- computer technology skills
- literacy skills to read and analyse information for its relevance and sufficiency, and follow policies and procedures
- numeracy skills to determine value for money etc
- communication skills to negotiate with online service provider/s
- ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities.

### **Linkages to Other Units**

This unit has linkages to the following unit/s and combined training and assessment may be appropriate:

- BSBEBUS304A Buy online
- BSBEBUS305A Sell online
- BSBEBUS306A Make payments online
- BSBEBUS405A Conduct online financial transactions
- BSBEBUS408A Implement and monitor delivery of quality customer service online

### **Critical Aspects of Assessment**

Evidence of the following is critical:

- integrated demonstration of all elements of competency and their performance criteria
- knowledge of organisational policies and authority structure for trading online
- knowledge of secure payment and supply systems
- legal requirements relating to online trade.

### **Context of Assessment and Resource Implications**

Assessment must ensure:

- competency is demonstrated by performance of all state criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence guide, and within the scope as defined by the Range Statement
- assessment takes account of the endorsed assessment guidelines in the Business Services Training Package
- assessment of performance requirements in this unit is undertaken in an actual workplace or simulated environment
- assessment reinforces the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit.
- the learner and trainer have access to appropriate documentation and resources normally used in the workplace
- in order to achieve consistency of performance, evidence is collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations.

### **Assessment Methods**

Assessment methods must be chosen to ensure that repair or servicing of a chassis can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.



The following examples are appropriate for this unit:

- project or work activities to research and assess various online suppliers and products for authenticity, reliability and financial stability with view to purchasing a product or range of products for an enterprise
- oral or written questions to assess knowledge and awareness of enterprise policies and authority structure for trading online, secure payment and supply systems and legal requirements
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

### Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform Level 2 = Administer and Manage Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	3	Identifying products to purchase, sell or trade Assessing suitability of suppliers
Communicating Ideas and Information	3	Negotiating terms and conditions of online trading Developing trading specifications Negotiating and implementing a range of transactions
Planning and Organising Activities	2	Preparing and promoting products for sale or auction Implementing a range of transactions in a secure environment Benefiting organisational objectives
Working with Others and in Teams	1	Negotiating and confirming organisational requirements for online trade Negotiating the promotion and administration of online transactions
Using Mathematical Ideas and Techniques	2	Pricing products for sale Facilitating the transaction process
Solving Problems	2	Administering organisational requirements for online trade Providing a secure trading environment Facilitating the transaction process
Using Technology	2	Trading online

## BSBEBUS405A      Conduct online financial transactions

### Unit Descriptor

This unit covers evaluation, use and management of online financial services.

This unit is related to BSBEBUS307A Bank online. Consider co-assessment with BSBEBUS404A Trade online.

Element	Performance Criteria
<b>1      Evaluate online financial services</b>	<p>1.1      Financial institutions providing online services are identified and their fees and services compared.</p> <p>1.2      <i>Security issues, regulatory requirements</i> and <i>authentication</i> arrangements are investigated and online policies, codes of practice and guarantees are obtained and analysed.</p> <p>1.3      <i>Online financial services</i> are compared with organisational requirements and a provider chosen that best meets service, security, privacy and value for money criteria.</p>
<b>2      Complete financial transactions online</b>	<p>2.1      Authentication data is secured in accordance with organisational requirements and used to access online financial services in accordance with the organisation's security policy and level of authority.</p> <p>2.2      Accounts are accessed online and balances and transaction history checked in accordance with organisational requirements.</p> <p>2.3      Available funds are confirmed and <i>transactions</i> completed in accordance with organisational policy and procedures and level of authority.</p> <p>2.4      The organisation's accountability, security and control requirements for online financial transactions are implemented and met.</p>

- |   |  |
|---|--|
| <b>3. Maintain and manage financial records</b> | <b>3.1</b> Records of financial transactions and balances are maintained in accordance with organisational requirements for accounting purposes.   |
|   | <b>3.2</b> Organisational records are compared with online financial transaction records and balances, and irregularities dealt with in accordance with organisational or system policy and procedures and/or national guidelines. |

## Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace may include:

- award and enterprise agreements
- national, State/Territory legislative requirements especially in regard to OH&S
- industry codes of practice
- OECD International Guidelines for Consumer Protection in E-Commerce
- copyright laws
- defamation laws
- privacy legislation
- intellectual property, confidentiality requirements
- legal and regulatory policies affecting e-business.

Security issues may include:

- level of encryption
- firewall protection
- physical site security of web server
- terms and conditions of website use
- use of 'cookies' – small files automatically downloaded from a web server to the computer of someone browsing a website – information stored in cookies can be accessed any time that computer returns to the site
- jurisdiction
- warranties
- disclaimers
- limit of liability
- receipting
- access to independent reviews of financial services: ACCC, FPA.

Regulatory requirements may include:

- national
- international.

Authentication may include:

- user name and password
- Personal Identification Number (PIN)

- authentication services eg Verisign.

Online financial services may include:

- access to bank statements
- account balances
- transfer of money between accounts
- electronic funds transfer (EFT)
- BPay
- electronic bill paying
- downloads from electronic accounting packages
- online payment
- credit card transactions
- account transaction history
- online applications for services such as new accounts, loans, insurance, credit cards, share trading, business products and services, superannuation
- electronic cash
- stored value smart card (or electronic purse)
- access to non-Internet based services such as call centres, interactive voice response (IVR).

Transactions may include:

- transfer of money between accounts
- bill paying
- credit card transactions
- share trading transactions
- applications.

## **Evidence Guide**

The Evidence Guide identifies the critical aspects, underpinning knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

### **Essential Knowledge and Skills to Be Assessed**

Knowledge and skills in the following areas must be assessed as part of this unit:

- relevant legislation from all levels of government that affects business operation, especially in regard to OH&S and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Internet/World Wide Web
- knowledge of the organisation's policies and procedures relating to use of Internet and online financial services
- Internet security issues
- organisational security policy
- organisational levels of authority for online transactions
- computer technology skills
- literacy skills to read and analyse information for its relevance and sufficiency, and follow policies and procedures
- numeracy skills to confirm banking records
- communication skills to negotiate with online financial service providers to deal with irregularities

- ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities.

### **Linkages to Other Units**

This unit has linkages to the following unit/s and combined training and assessment may be appropriate:

- BSBEBUS307A Bank online
- BSBEBUS404A Trade online

### **Critical Aspects of Assessment**

Evidence of the following is critical:

- Integrated demonstration of all elements of competency and their performance criteria
- Security procedures to prevent unauthorised use of user name, password or PIN
- Control measures to identify and prevent errors.

### **Context of Assessment and Resource Implications**

Assessment must ensure:

- competency is demonstrated by performance of all state criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence guide, and within the scope as defined by the Range Statement
- assessment takes account of the endorsed assessment guidelines in the Business Services Training Package
- assessment of performance requirements in this unit is undertaken in an actual workplace or simulated environment
- assessment reinforces the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit.
- the learner and trainer have access to appropriate documentation and resources normally used in the workplace
- in order to achieve consistency of performance, evidence is collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations.

### **Assessment Methods**

Assessment methods must be chosen to ensure that repair or servicing of a chassis can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- work activities to evaluate online financial institutions for fees, services, security, privacy and value for money
- work activity to balance online financial transactions
- oral or written questions to assess knowledge and awareness of security issues, regulatory requirements and authentication arrangements in order to select a service provider
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

### **Key Competencies in this Unit**

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform Level 2 = Administer and Manage Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	3	Comparing online financial services Providing a secure trading environment Maintaining, managing and recording financial transactions
Communicating Ideas and Information	2	Negotiating financial arrangements Comparing differences between online and organisational records
Planning and Organising Activities	2	Completing online financial transactions in a secure trading environment
Working with Others and in Teams	2	Discussing transaction irregularities Administering financial transactions
Using Mathematical Ideas and Techniques	1	Administering and completing online financial transactions
Solving Problems	2	Administering financial transactions in a secure trading environment Evaluating and choosing online financial services
Using Technology	2	Completing financial transactions online

## ICAITS193A Connect a workstation to the Internet

### Unit Descriptor

This unit defines the competency required to connect a personal computer to the Internet.

The project lifecycle and the IT methodology employed will determine which particular units of competency are relevant to this unit, some include the Project Management, Implementation, Support, the teamwork functional areas and documentation.

Element	Performance Criteria
<b>1 Account with an Internet service provider (ISP) is created</b>	<p>1.1 Internet service providers are compared and analysed in relation to cost, connectivity and support.</p> <p>1.2 ISP is chosen and account is created with appropriate password.</p> <p>1.3 Dial up networking connection shortcut is created on the desktop using relevant software.</p>
<b>2 Modem is connected and tested</b>	<p>2.1 Commercially available modems are compared as required for functionality and cost with reference to PC configurations and connectivity.</p> <p>2.2 Modem is selected based on preferred specifications.</p> <p>2.3 Modem is installed and tested as required in accordance with vendors instructions and PC operating system.</p>
<b>3. Browser software is loaded</b>	<p>3.1 Browser software is selected and loaded as required.</p> <p>3.2 Browser software is configured as required by PC configuration and personal preference.</p>
<b>4. Personal computer is connected to the Internet</b>	<p>4.1 PC is connected to the Internet through dial up networking shortcut.</p> <p>4.2 Browser is launched to enable access to the Internet.</p>

## Range Statement

The Range of Variables section contextualises the unit of competence and provides a focus for assessment. The information provided is intended to define the scope of assessment and to assist assessors define the performance to be achieved by an individual in the workplace.

Connectivity:

- cable
- ADSL
- ISDN
- fibre optics
- twisted pair.

Modems:

- internal
- external
- networked.

OH & S Standards:

- As per company, statutory and vendor requirements
- Ergonomic and environmental factors must be considered during the demonstration of this competency; OH&S guidelines related to use of screen based equipment, computing equipment and peripherals, and ergonomic work stations; security procedures; customisation requirements.

Workplace environment:

- May involve a business involved in a total organisational change, a systems only change, a business improvement process, an e-business solution involving the total organisation or part of the organisation.

E-commerce models

- Includes any kind of business-related transaction conducted with the assistance of electronic tools across and within organisations or with individual customers
- May include Brochure Site, Customer Service Site, Real Time Site, Quote Aggregator, Insurance Mall, Direct Channel, Virtual Carrier, Quote Mall, Agent Mall, Consumer Auction, Carrier Auction, Time Limited Information, Investor Relations, Technical Support, Pre Sales Support and Corporate Awareness, Proprietary Standard Promotion
- E-commerce models are changing all the time and the above are just an example of possible models.

E-business:

- Encompasses how organisations structure themselves and capture information, manage their workers, relate and partner with other organisations and groups to achieve effective functioning, efficient operations and cultural shifts.

Knowledge Economy:

- Involves all individuals participating on-line for professional or personal research and learning, communicating with friends or associates and the pursuit of leisure activities
- The knowledge economy is broader than on-line participation and includes knowledge workers and organisations and recognises the value of life long learning and the need to capture knowledge within organisations to ensure effective functioning.



Hardware can include IT equipment of all types:

- Work stations
- PCs
- Networks
- Remote sites
- Servers.

## **Evidence Guide**

The Evidence Guide identifies the critical aspects, underpinning knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

## **Essential Knowledge and Skills to Be Assessed**

Knowledge and skills in the following areas must be assessed as part of this unit:

- the range of Internet service providers (ISPs) and the varying plans and services offered
- current browser software eg MS Explorer, Netscape Navigator
- the operation of the world wide web, web pages and directories
- Australian Computer Society Code of Ethics
- operating a PC
- key boarding skills.

## **Linkages to Other Units**

The interdependence of units of competency for assessment will vary with the particular project or scenario. This unit has importance to a range of IT services and should therefore be assessed in a holistic manner with the technical/support units.

## **Critical Aspects of Assessment**

Evidence of the following is critical:

- assessment must confirm the ability to connect a workstation to the Internet.

## **Context of Assessment and Resource Implications**

Assessment must ensure:

- an individual demonstrating these competencies would be able to: demonstrate knowledge by recall in a narrow range of areas; demonstrate basic practical skills, such as the use of relevant tools; perform a sequence of routine tasks given clear direction; and receive and pass on messages/information
- breadth, depth and complexity of knowledge and skills would prepare a person to perform in a range of varied activities or knowledge application where there is a clearly defined range of options to be applied
- an individual demonstrating these competencies would be able to: demonstrate basic operational knowledge in a moderate range of areas; apply a defined range of skills; apply known solutions to a limited range of predictable problems; perform a range of tasks where choice between a limited range of options is required; assess and record information from varied sources; and take limited responsibility for one's own outputs in work and learning
- this competency can be assessed in the workplace or in a simulated environment
- assessment of this unit of competence will usually include observation of real or simulated work processes and procedures, quality projects, questioning on underpinning knowledge and skills

- to demonstrate competence in this unit the candidate will need access to: a PC, an Internet connection, a modem
- questions related to the performance criteria and directed to the candidate, peers and business client will assist in assessing competence
- observation of skills may assist in the collection of evidence
- competence in this unit needs to be assessed using formative assessment to ensure consistency of performance in a range of contexts
- simulated activities must closely reflect the workplace and may need to take place over a period of time to allow the candidate to fully demonstrate competence.

### Assessment Methods

Assessment methods must be chosen to ensure that repair or servicing of a chassis can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- work activity to connect a workstation to the Internet for an enterprise, including researching and comparing Internet Service Providers for cost, connectivity and support, modem functionality and cost
- oral or written questions to assess knowledge and awareness of a range of modem specifications, PC operating systems, browser software, dialup networks
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

### Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform Level 2 = Administer and Manage Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	2	Researching and collecting information in order to select an Internet Service Provider
Communicating Ideas and Information	2	Discussing with colleagues the requirements for a workstation including PC configuration and personal preferences
Planning and Organising Activities	2	Planning and installing a modem and testing it as required in accordance with vendor's instructions and PC operating system
Working with Others and in Teams	2	Liaising with colleagues to discuss particular needs for a workstation
Using Mathematical Ideas and Techniques	2	Configuring browser software or modem specifications Comparing costs of Internet Service Providers
Solving Problems	2	Dealing with technical problems such as inappropriate PC configuration
Using Technology	2	Applying technological knowledge to connect a workstation to the Internet

## ICAITS017C Maintain system integrity

### Unit Descriptor

This unit expresses the competency required to protect and secure stand-alone or client server environments.

The project lifecycle and the IT methodology employed will determine which particular units of competency are relevant to this unit. Some include ICAITU019B, ICAITS025B, ICAITS113B, ICAS021B, ICAITS020C, ICAITB060A, ICAITS031B.

Element	Performance Criteria
<b>1 Carry out file maintenance</b>	<ul style="list-style-type: none"><li>1.1 File back-ups are carried out.</li><li>1.2 Back-ups are determined and stored according to organisational guidelines.</li><li>1.3 Records of back-up are maintained.</li></ul>
<b>2 Carry out virus scanning</b>	<ul style="list-style-type: none"><li>2.1 Virus protection is maintained.</li><li>2.2 Detected viruses are reported to supervisor and are removed.</li></ul>
<b>3. Follow software copyright procedures</b>	<ul style="list-style-type: none"><li>3.1 Software licenses are monitored.</li><li>3.2 Illegal software is determined.</li><li>3.3 Illegal software is reported to supervisor.</li></ul>
<b>4. Record software licenses</b>	<ul style="list-style-type: none"><li>4.1 Licensed software is determined.</li><li>4.2 Records of licence number and location are maintained.</li><li>4.3 Personal computers and networks are checked for illegal software.</li><li>4.4 Illegal software is reported to supervisor.</li></ul>
<b>5. Restore system back-up</b>	<ul style="list-style-type: none"><li>5.1 Back-ups are restored.</li><li>5.2 Restore procedures are determined according to the organisational guidelines.</li><li>5.3 Restore is carried out under supervisor instruction.</li><li>5.4 Restore carried out is recorded according to the organisational guidelines.</li></ul>

## Range Statement

The Range of Variables section contextualises the unit of competence and provides a focus for assessment. The information provided is intended to define the scope of assessment and to assist assessors define the performance to be achieved by an individual in the workplace.

Hardware may include:

- personal computers
- networked systems
- tools to perform back-ups such as tapes
- streamers
- floppy disks.

Applications may include presentation applications contained in:

- Microsoft Office
- Lotus Suite
- Claris Works
- Star Office or other similar applications.

Keyboarding:

- speed will vary according to different organisational requirements and different job roles within an organisation
- the keyboard technique will be in line with OHS requirements for safe use of keyboards.

Organisational:

- variables may include but are not limited to keyboarding and accuracy as per organisation guidelines.

Operating systems:

- Command line and Graphical User Interface.

Storage media/Disks may include but are not limited to:

- Diskettes
- CDs
- zip disks
- local HDDs
- remote HDDs.

Documentation and Reporting:

- documentation for version control may follow ISO standards
- audit trails, naming standards, version control, project management templates and report writing styles will vary according to organisational approach
- information gathering processes may have associated templates.

OH&S Standards:

- as per company, statutory and vendor requirements
- ergonomic and environmental factors must be considered during the demonstration of this competency.

Organisational Standards:

- may be based upon formal, well documented methodologies or non-existent

- for training delivery purposes best practice examples from industry will be used.

Software:

- software application/operating system with system security functions.

Organisation variables may include:

- security procedures
- backing-up procedures
- virus removal procedures
- software licence documentation
- reporting of illegal software
- restore procedures.

Client User:

- may be a department within the organisation or a third party and so the relation and ease of access will vary.

Antivirus software: There are various antivirus software applications available. Some include:

- McAfee
- Panda AntiVirus
- Protector Plus Antivirus Software
- Pelican Software's SafeTNet
- Symantec's Norton Antivirus
- Command Anticirus
- ESafe
- Vet.

## **Evidence Guide**

### **Essential Knowledge and Skills to Be Assessed**

Knowledge and skills in the following areas must be assessed as part of this unit:

- software copyright responsibilities
- a broad knowledge base incorporating some theoretical concepts of system performance
- broad knowledge of maintenance procedures
- a broad knowledge base of inventory procedures
- a broad knowledge base incorporating some theoretical concepts of restore procedures
- a broad knowledge base of storage and retrieval guidelines
- a broad knowledge base incorporating some theoretical concepts of operating systems
- current industry accepted hardware and software products with broad knowledge of general features and capabilities and detailed knowledge in some areas
- a broad knowledge base incorporating some theoretical concepts of diagnostic tools
- a broad knowledge base of current viruses and protection methods
- plain English literacy and communication skills in relation to the presentation of information
- basic diagnostic skills in relation to system integrity
- questioning and active listening in regard to clarifying instructions
- basic analytical skills in relation to system integrity
- problem solving skills for a defined range of predictable problems
- problem solving in regard to known problems in routine procedures
- research skills for identifying broad features of current viruses and best practice in virus protection.

## Linkages to Other Units

This unit may be assessed with any of the following: ICAITU019B, ICAITS025B, ICAITS113B, ICAS021C, ICAITS020C, ICAITB060B, ICAITS031B. The interdependence of units of competency for assessment will vary with the particular project or scenario.

## Critical Aspects of Assessment

Evidence of the following is critical:

- assessment must confirm the ability to protect and secure stand alone or networked client server environments and operating systems according to system maintenance procedures. Undertaking file back-up, restore, delete and archive are carried out according to back-up and restore procedures.

## Context of Assessment and Resource Implications

Assessment must ensure:

- assessment of this unit of competence usually includes observation of real or simulated work processes and procedures; quality projects; questioning on underpinning knowledge and skills. The questioning of team members provides valuable input to the assessment.
- this competency can be assessed in the workplace or in a simulated environment. The purpose of this unit of competence is to define the standard of performance to be achieved in the workplace.
- work is carried out under routine supervision. An individual demonstrating this Unit would be able to: demonstrate basic operational knowledge in a moderate range of areas; apply a defined range of skills; apply known solutions to a limited range of predictable problems; perform a range of tasks where choice between a limited range of options is required; assess and record information from varied sources; and take limited responsibility for one's own output in work and learning.
- to demonstrate this unit of competence the candidate will require access to:
  - Back-up guidelines
  - Antivirus software
- questions related to the performance criteria and directed to the candidate, peers and business client will assist in assessing competence. Observation of skills may assist in the collection of evidence
- competence in this unit needs to be assessed using formative assessment to ensure consistency of performance in a range of contexts
- simulated activities must closely reflect the workplace and may need to take place over a period of time.

## Assessment Methods

Assessment methods must be chosen to ensure that repair or servicing of a chassis can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- progress reports to evaluate the security and integrity of a system for a particular enterprise over a period of time
- work activity to select an appropriate anti-virus software, carry out virus scanning, detect viruses and take appropriate action
- oral or written questions to assess knowledge and awareness of file maintenance, virus protection, software copyright and record copyright.

- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

**Key Competencies in this Unit**

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform Level 2 = Administer and Manage Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	2	Researching appropriate anti-virus software and back-up systems
Communicating Ideas and Information	1	Explaining back-up system and virus protection procedures to colleagues
Planning and Organising Activities	2	Planning and conducting a back-up schedule and maintaining records of back-up
Working with Others and in Teams	1	Conducting a back-up and restoring data
Using Mathematical Ideas and Techniques	1	Comparing records of licence numbers and location of software
Solving Problems	1	Retrieving information following a systems crash Identifying and quarantining a virus
Using Technology	2	Applying knowledge of the importance of systems integrity to work activities

## BSBEBUS302A      Use and maintain electronic mail system

### Unit Descriptor

This unit covers the organisation and maintenance of electronic mail system.

This unit is related to BSBEBUS402A Implement e-correspondence policies. Consider co-assessment with BSBEBUS301A Search and assess online business information.

Element	Performance Criteria
<b>1      Access and organise electronic mail</b>	<p>1.1      Urgent mail is identified, prioritised and dealt with first in accordance with organisational requirements.</p> <p>1.2      <i>Suspicious or potentially dangerous electronic mail</i> is identified and handled in accordance with organisational requirements and information/warnings/remedial action is conveyed to work team.</p> <p>1.3      Electronic mail is checked for completeness, opened or forwarded in accordance with organisational policy and procedures relating to confidentiality or privacy.</p> <p>1.4      <i>Returned email is dealt with</i> in accordance with organisational policy and procedures.</p>
<b>2      Initiate and respond to electronic mail</b>	<p>2.1      Messages are prepared in accordance with <i>organisational protocols</i> for language, tone and format.</p> <p>2.2      Content, structure and recipient address/es for electronic mail are checked for <i>accuracy</i> and any attachments identified and <i>prepared</i> in accordance with organisational and service provider requirements.</p> <p>2.3      Electronic mail is <i>dispatched</i> in accordance with organisational requirements within required timeframes.</p>



- |  |   |     |  |     |   |     |  |
|--|---|-----|--|-----|---|-----|--|
| <b>3. Maintain housekeeping system</b> | <table border="0"><tr><td style="vertical-align: top; padding-right: 10px;">3.1</td><td>Electronic mail and/or attachments are copied or <i>stored</i> in accordance with organisational requirements.</td></tr><tr><td style="vertical-align: top; padding-right: 10px;">3.2</td><td>Electronic <i>mailing lists</i> are prepared and maintained in accordance with organisational requirements.</td></tr><tr><td style="vertical-align: top; padding-right: 10px;">3.3</td><td>Inboxes are emptied and electronic mail is archived or permanently deleted in accordance with organisational requirements.</td></tr></table> | 3.1 | Electronic mail and/or attachments are copied or <i>stored</i> in accordance with organisational requirements. | 3.2 | Electronic <i>mailing lists</i> are prepared and maintained in accordance with organisational requirements. | 3.3 | Inboxes are emptied and electronic mail is archived or permanently deleted in accordance with organisational requirements. |
| 3.1                                    | Electronic mail and/or attachments are copied or <i>stored</i> in accordance with organisational requirements.  |     |  |     |   |     |  |
| 3.2                                    | Electronic <i>mailing lists</i> are prepared and maintained in accordance with organisational requirements.   |     |  |     |   |     |  |
| 3.3                                    | Inboxes are emptied and electronic mail is archived or permanently deleted in accordance with organisational requirements.  |     |  |     |   |     |  |

## Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace may include:

- award and enterprise agreements
- national, State/Territory legislative requirements especially in regard to OH&S
- industry codes of practice
- and must include:
- copyright laws
- defamation laws
- privacy legislation
- intellectual property, confidentiality requirements
- legal and regulatory policies affecting e-business.

Suspicious or potentially dangerous electronic mail may include:

- unsolicited mail containing viruses
- spam (unsolicited commercial email or junk mail)
- mail where sender is unknown and subject line is enticing and/or personal (eg urging the receiver to open immediately)
- attachments
- particular file extensions.

Dealing with returned (bounced) email may include:

- checking email address
- checking size of attachment/s
- re-sending
- sending message by other means eg facsimile, post
- telephoning addressee.

Organisational protocols may include:

- net etiquette
- net ethics
- form of address
- formality/informality of language, tone and structure

- length of emails (ie short and to the point)
- concise, relevant subject line
- carbon copies or blind carbon copies
- including original message in the reply
- requesting read receipt
- sender's name and address
- electronic signature.

Net etiquette (netiquette) refers to:

- codes of conduct or codes of practice such as those used by discussion groups
  - accepted (not mandated) rules for being a good net citizen (netizen)
  - remember you're dealing with real people not computers
  - if you wouldn't do it in real life don't do it in cyberspace
  - adjust to the style and tone of discussion groups
  - respect other's time and bandwidth
  - look good online (spelling, grammar, and something worth saying)
  - share expert knowledge
  - keep flames under control (flaming is making personal attacks on others)
  - respect other people's privacy
  - don't abuse your power
  - be forgiving of other's mistakes
- from Virginia Shea (1994) *Netiquette*, Albion Books San Francisco pp 32 – 33.

Checking for accuracy should include:

- clarity of intended meaning
- spelling
- grammar
- punctuation.

Preparing attachments may include:

- dealing with large attachments especially picture files
- considering the limitations when sending large files
- checking that file size will negotiate the service provider's gateway
- separating large documents into a number of files
- compressing files.

Dispatching email may include:

- single receiver
- group email
- carbon copies
- blind carbon copies
- email bulletin board or discussion list.

Storage of electronic mail may include:

- within electronic mail application software
- specialised record keeping, spreadsheet or database software
- paper-based filing system.

Mailing lists may include:

- electronic address books
- database or spreadsheet records

- wordprocessing tables or data files.

## **Evidence Guide**

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

### **Essential Knowledge and Skills to Be Assessed**

Knowledge and skills in the following areas must be assessed as part of this unit:

- relevant legislation from all levels of government that affects business operation, especially in regard to OH&S and environmental issues, equal opportunity, industrial relations and anti-discrimination
- knowledge of the organisation's policies and procedures relating to electronic mail
- knowledge of service provider requirements especially with regard to email attachments
- naming protocols for email addresses
- electronic file handling (saving, copying, moving, deleting)
- occupational Safety and Health requirements for working with computer technology
- computer technology skills to use email
- literacy skills to compose and check accuracy of messages, and follow policies and procedures
- communication skills to refer information to supervisors or peers especially in dealing with suspicious or potentially dangerous electronic mail
- ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities.

### **Linkages to Other Units**

This unit has linkages to the following unit/s and combined training and assessment may be appropriate:

- BSBEBUS402A Implement e-correspondence policies
- BSBEBUS301A Search and assess online business information

### **Critical Aspects of Assessment**

Evidence of the following is critical:

- integrated demonstration of all elements of competency and their performance criteria
- knowledge of the organisation's policies and procedures relating to electronic mail
- knowledge of service provider requirements.

### **Context of Assessment and Resource Implications**

Assessment must ensure:

- competency is demonstrated by performance of all state criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence guide, and within the scope as defined by the Range Statement
- assessment takes account of the endorsed assessment guidelines in the Business Services Training Package
- assessment of performance requirements in this unit is undertaken in an actual workplace or simulated environment
- assessment reinforces the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit.

- the learner and trainer have access to appropriate documentation and resources normally used in the workplace
- in order to achieve consistency of performance, evidence is collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations.

### Assessment Methods

Assessment methods must be chosen to ensure that repair or servicing of a chassis can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- work activities to assess, organise and prioritise electronic mail such as identifying urgent mail, returned email, dispatch of email
- valuation of portfolio of electronic mail and documents prepared by the candidate for an enterprise over a period of time
- review of files and file keeping systems for electronic mail established and maintained by the candidate
- oral or written questions to assess knowledge and awareness of e-business security issues, enterprise policies and procedures and service provider requirements, potential, or suspicious/dangerous or illegal electronic mail
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

### Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform Level 2 = Administer and Manage Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	2	Receiving and administering incoming mail Dispatching outgoing electronic mail
Communicating Ideas and Information	2	Initiating and responding to incoming mail Composing and sending electronic mail
Planning and Organising Activities	2	Dividing or compressing email attachments and for the administration Dispatching electronic mail
Working with Others and in Teams	1	Dealing with suspicious or potentially dangerous email Administering the electronic mail system
Using Mathematical Ideas and Techniques	1	Sorting and recording electronic mail
Solving Problems	2	Administering the system especially in dealing with returned mail and in dealing with suspicious or potentially dangerous email
Using Technology	1	Administering the electronic mail system Sending and receiving email

## BSBEBUS403A      Communicate electronically

### Unit Descriptor

This unit covers online communication, electronic conferencing and collaboration, and participation in a virtual community via Internet/intranet/extranet and implementation of organisational policies and procedures.

Consider co-assessment with BSBEBUS401A Conduct online research and BSBEBUS402A Implement e-correspondence policies.

Element	Performance Criteria
<b>1      Communicate online</b>	<ul style="list-style-type: none"><li>1.1    Technology <i>requirements for communicating online</i> are researched and current equipment and software confirmed as sufficient for participation.</li><li>1.2    Internet culture, <i>net ethics</i> and <i>net etiquette</i> is investigated and implemented to enable effective participation using electronic communication media.</li><li>1.3    <i>Electronic groups</i> are accessed to share information on business topics in accordance with organisational policy and procedures.</li><li>1.4    Participation in business electronic <i>chat</i> rooms and Internet meetings occurs in accordance with organisational policy and procedures and accepted net etiquette.</li><li>1.5    Record keeping requirements relating to online communication are met in accordance with organisational requirements.</li></ul>

- |  |  |
|--|--|
| <b>2 Collaborate online</b>                            | <p>2.1 <i>Parameters</i> for online collaboration are negotiated with group members in accordance with organisational requirements.</p> <p>2.2 Available hardware and software are confirmed as meeting the requirements for online collaboration in accordance with specified parameters.</p> <p>2.3 Material is posted and responded to and online discussions held with group members in accordance with agreed collaboration parameters and organisational requirements.</p> <p>2.4 Record keeping requirements relating to online collaboration are met in accordance with organisational requirements.</p> <p>2.5 <i>Legal and ethical requirements</i> for online collaboration are met in accordance with organisational requirements.</p> |
| <b>3. Implement electronic conferencing procedures</b> | <p>3.1 Procedures, protocols and meeting behaviour for electronic conferencing are identified and implemented.</p> <p>3.2 Technology requirements for electronic conferencing are confirmed.</p> <p>3.3 <i>Software features</i> to be used during conferencing are agreed and mastered.</p> <p>3.4 Participation in electronic conferencing occurs in accordance with electronic communication policy and organisational requirements.</p> <p>3.5 Record keeping requirements relating to electronic conferencing are met in accordance with organisational requirements.</p>   |

## Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace may include:

- award and enterprise agreements
- national, State/Territory legislative requirements especially in regard to OH&S
- industry codes of practice
- copyright laws
- defamation laws
- privacy legislation

- intellectual property, confidentiality requirements
- legal and regulatory policies affecting e-business.

Requirements for communicating online may include:

- Internet connection
- web browser
- email software
- news reader software
- Internet Relay Chat (IRC) software
- voice over the Internet software
- net meeting software (with text chat, whiteboard and file transfer)
- video conferencing software
- sound card - full (or half) duplex
- full-duplex audio (desirable) allowing you to speak and hear at the same time
- half-duplex audio – one speaker at a time – if both speak, no-one hears
- video card
- digital camera
- digitiser
- microphone
- speakers or headphones
- Internet telephone.

Net ethics (nethics) refers to:

- behaviour on the Internet:
- if it's inappropriate or illegal in real life, it's inappropriate or illegal in cyberspace eg
  - copyright and intellectual property rights must be respected
  - people have been sued for libel over the content of email messages.

Net etiquette (netiquette) refers to:

- protocols for discussion groups
- accepted (not mandated) rules for being a good net citizen (netizen)
- remember you're dealing with real people not computers
- if you wouldn't do it in real life don't do it in cyberspace
- adjust to the style and tone of discussion groups
- respect other's time and bandwidth
- look good online (spelling, grammar, and something worth saying)
- share expert knowledge
- keep flames under control (flaming is making personal attacks on others)
- respect other people's privacy
- don't abuse your power
- be forgiving of other's mistakes
- from Virginia Shea (1994) *Netiquette*, Albion Books San Francisco pp 32 – 33.

Electronic groups may include:

- electronic bulletin boards
- discussion lists
- discussion groups
- news groups
- virtual communities.

Electronic bulletin board refers to:

- an electronic discussion list where members each have an email address; subscribers to the list can leave messages, ask questions and share ideas and others can respond; everyone on the list receives every message; some lists allow a digest to be created and a single email sent rather than multiple emails.

Discussion group refers to:

- an electronic bulletin board on a website where registered members read and post to the discussions; online discussions may be open (for viewing and contribution), moderated (contributions are checked by a moderator before being publicly visible) or closed (visible only to a specified group of people).

Newsgroup refers to:

- discussion groups dedicated to specific topics hosted on ISP servers; some newsgroups are moderated, most are not; newsreader software is required, registration is not.

Chat may include:

- Internet chat
- Internet Relay Chat (IRC).

Parameters for online collaboration may include:

- posted materials only
- access levels restricted by password
- access to data files
- open access to all members' working documents
- application sharing.

Legal and ethical requirements may include:

- privacy
- confidentiality
- intellectual property.

Procedures, protocols and meeting behaviour for conferencing may include:

- appointment of gatekeeper
- procedure for connecting
- conferencing facilitator
- conference chair
- conferencing etiquette
- meeting behaviour guidelines
- conference agenda.

Electronic conferencing may include:

- audio conferencing via the Internet
- video conferencing.

Requirements for electronic conferencing may include:

- voice over the Internet software
- net meeting software
- video conferencing software
- sound card
- video card
- digital camera



- digitiser
- microphone
- speakers or headphones
- Internet telephone.

Conferencing software features may include:

- text chat
- whiteboard
- file transfer
- application sharing.

## **Evidence Guide**

The Evidence Guide identifies the critical aspects, underpinning knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

### **Essential Knowledge and Skills to Be Assessed**

Knowledge and skills in the following areas must be assessed as part of this unit:

- relevant legislation from all levels of government that affects business operation, especially in regard to OH&S and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Internet/World Wide Web
- organisational electronic communication policy
- 'Netiquette'
- technology requirements for communicating online
- software features for communicating online
- privacy, intellectual property and confidentiality requirements
- computer technology skills for corresponding and communicating electronically
- literacy skills to compose and check accuracy of text and follow policies and procedures
- communication skills to participate in online conferences and chat rooms
- ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities.

### **Linkages to Other Units**

This unit has linkages to the following unit/s and combined training and assessment may be appropriate:

- BSBEBUS401A Conduct online research
- BSBEBUS402A Implement e-correspondence policies

### **Critical Aspects of Assessment**

Evidence of the following is critical:

- integrated demonstration of all elements of competency and their performance criteria
- meeting the requirements of the organisation's electronic communication policy while communicating online.

### **Context of Assessment and Resource Implications**

Assessment must ensure:

- competency is demonstrated by performance of all state criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence guide, and within the scope as defined by the Range Statement

- assessment takes account of the endorsed assessment guidelines in the Business Services Training Package
- assessment of performance requirements in this unit is undertaken in an actual workplace or simulated environment
- assessment reinforces the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit.
- the learner and trainer have access to appropriate documentation and resources normally used in the workplace
- in order to achieve consistency, evidence is collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations.

### Assessment Methods

Assessment methods must be chosen to ensure that repair or servicing of a chassis can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.

The following examples are appropriate for this unit:

- work activities to communicate online related to job role using electronic media such as bulletin boards, newsgroups, virtual communities ensuring legal, ethical, procedural requirements related to electronic communication are met
- evaluation of a range of types of electronic communications conducted by the candidate
- oral or written questions to assess knowledge and awareness of various forms and features of electronic communications and advantages and disadvantages of each, ethical and legal considerations
- review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.

### Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.

Level 1 = Perform Level 2 = Administer and Manage Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	2	Investigating 'netiquette' requirements
Communicating Ideas and Information	2	Collaborating in online conferences and through text
Planning and Organising Activities	2	Participating in electronic conferencing Implementing procedures and protocols for online conferencing
Working with Others and in Teams	2	Implementing procedures and protocols Collaborating online
Using Mathematical Ideas and Techniques	1	Connecting to online conferences
Solving Problems	2	Implementing procedures and protocols Negotiating collaboration parameters
Using Technology	2	Communicating online



# Innovation

**COMPETENCY STANDARDS FOR THE CARAVAN  
INDUSTRY TRAINING PACKAGE**



# CONTENTS

<b>INNOVATION</b>		<b>1</b>
<b>TTHICS01A</b>	<b>CONTRIBUTE TO WORKPLACE IMPROVEMENTS</b>	<b>1</b>
<b>TTHICS02A</b>	<b>SHARE IDEAS IN THE WORKPLACE</b>	<b>6</b>
<b>THHICS03A</b>	<b>DEVELOP INNOVATIVE IDEAS AT WORK</b>	<b>11</b>
<b>THHICS04A</b>	<b>ORIGINATE AND DEVELOP A CONCEPT</b>	<b>17</b>
<b>THHICS05A</b>	<b>LEAD A TEAM TO FOSTER INNOVATION</b>	<b>23</b>
<b>THHICS06A</b>	<b>CREATE AN INNOVATIVE WORK ENVIRONMENT</b>	<b>29</b>
<b>THHICS07A</b>	<b>SET UP SYSTEMS THAT SUPPORT INNOVATION</b>	<b>35</b>



**TTHICS01A****Contribute to workplace improvements****Unit Descriptor**

This competency standard covers the skills required to observe details in workplaces throughout the hospitality, tourism and caravan industry and to generate ideas for improvement. This entails being able to identify areas for improvement, generate appropriate ideas or solutions and evaluate their appropriateness. The standard relates to entry-level jobs in hospitality, tourism and caravan establishments and may include jobs such as housekeeping in hotels, food and beverage, and kitchen attending.

<b>Element</b>	<b>Performance criteria</b>
<b>1. Identify areas for improvement</b>	1.1 Own role and others are clearly identified. 1.2 Opportunities for improvement are identified. 1.3 Area for improvement is carefully checked and clarified.
<b>2. Generate ideas for improvement</b>	2.1 A range of ideas/solutions is generated. 2.2 Information relevant to ideas is gathered. 2.3 Ideas are reviewed for relevance and practicality. 2.3 Suitable idea/s are developed further.
<b>3. Discuss idea/s with others</b>	3.1 People who can contribute to the idea/s for improvement are identified. 3.2 Appropriate communication method is selected. 3.3 Feedback on idea/s is sought, discussed and considered. 3.4 Proposed idea/s for improvement is reviewed and developed in response to feedback.
<b>4. Develop the idea/s for improvement</b>	4.1 Process for implementing idea/s is planned and explored. 4.2 Idea/s for improvement is presented to appropriate people.
<b>5. Review the proposed improvement</b>	5.1 Process for development and implementation of idea/s is reviewed.



## Range of variables

The range of variables explains how this competency standard can be used to contribute to workplace improvements. The variables chosen in training and assessment will depend on the work contexts which could be in any part of the tourism, hospitality and caravan industry.

The contexts may include any area of the tourism, hospitality and caravan industry and might include a hotel, a bar, a restaurant, a kitchen, a caravan park, a winery, an attraction and so on.

What does carefully checking the area for improvement involve?

Checking the area for improvement involves observing problems, understanding current procedures and processes and asking questions.

How can ideas/solutions be generated?

Ideas/solutions might be generated by talking to colleagues or supervisors, using brainstorming techniques, visualising different ways of working or developing checklists and/or plans.

How are ideas developed further?

Ideas might be developed by thinking through all aspects of the idea/s, the resources needed, time required and so on.

Who are people who can contribute?

People who may contribute include those who can challenge, support, fund, promote or provide technical knowledge for the idea/s.

What types of communication methods are there?

Communication methods may include face to face, in a meeting, by telephone, by email or in writing.

How is feedback sought, discussed and considered?

Seeking, discussing and considering feedback refers to actively listening, asking questions, clarifying understanding and accepting the opinions and ideas of others. Occupational health and safety considerations should be taken into account as well as cross-cultural implications.

How is the process planned?

Planning the process includes identifying all the steps required for implementing the idea/improvement.

What is involved in the review process?

Reviewing the process might involve identifying problems that were encountered, aspects that worked really well and identifying possible solutions for future action.

## Evidence guide

### What evidence is required to demonstrate competence for this standard as a whole?

Overall competence in this standard requires evidence that individuals can observe problems and develop ideas/suggestions for improvements to processes, procedures or systems in the workplace within the tourism, hospitality and caravan industry. They must show that they understand their own role and the role of others, be able to develop and evaluate their own ideas and consult with relevant others.

What specific knowledge is needed to achieve the performance criteria?

Knowledge and understanding are essential to apply this competency standard in the workplace, to transfer the skills to other contexts and to deal with unplanned events. The knowledge requirements for this competency standard are:

- how to interpret workplace procedures and work instructions
- knowledge of organisational structure
- health and safety procedures
- cultural difference
- communication, interpersonal and customer service skills in a socially diverse context
- evaluation and review procedures
- creative thinking techniques.

What specific skills are needed to achieve the performance criteria?

To achieve the performance criteria, some complimentary skills are required. These are:

- ability to accept positive and negative feedback
- ability to observe details and changes
- ability to experiment with ideas
- presentation skills
- ability to recognise limitations and ask for help where needed
- ability to listen to ideas and opinions of others with an open mind.

### What processes should be applied to this competency standard?

There are a number of processes that are learnt throughout work and life which are required in all jobs. They are fundamental processes and generally transferable to other work functions. Some of these are covered by the **7 key competencies**, although others may be added. The questions below highlight how these processes are applied in this competency standard. Following each question a number in brackets will indicate the level to which the key competency needs to be demonstrated where **0** = not required, **1** = perform the process, **2** = perform and administer the process and **3** = perform, administer and design the process.

1. How can communication of ideas and information (2) be applied?

By discussing ideas with colleagues, supervisors or managers.

- |    |  |  |
|----|--|--|
| 2. | How can information be collected, analysed and organised (2)?        | By collecting relevant information that may check or clarify need for improvement.                 |
| 3. | How are activities planned and organised (2)?                        | By planning and organising the idea and steps to implement it.                                     |
| 4. | How can team work (2) be applied?                                    | Team work will be required in discussing ideas with relevant people.                               |
| 5. | How can the use of mathematical ideas and techniques (1) be applied? | These may be applied depending on the work context and ideas that are generated.                   |
| 6. | How can problem solving skills (2) be applied?                       | Problem solving skills may be applied when working out how to present the idea or to implement it. |
| 7. | What technology (1) might be used?                                   | This will depend on the technology needed to implement the idea/improvement.                       |

**Are there other competency standards that could be assessed with this one?**

This competency standard should be assessed with other standards that make up a specific job function for a specific context within the tourism, hospitality and caravan industry. Standards may include:

THHBFB00B Clean and tidy bar areas  
THHBFB02B Provide a link between kitchen and service areas  
THHGHS02B Clean premises and equipment  
THHBH03B Prepare rooms for guests  
THTFAT01B Provide on-site information and assistance.

**How does this standard work in practice?**

Tina has been working for about four months in the housekeeping department of a medium-sized city hotel. Her job involves cleaning rooms, making beds and certain aspects of preparing rooms for guests. She may deal with guest requests for things like extra blankets, rollaway beds and general information about how equipment in the room operates or opening hours of restaurants and so on.

She does the job well and was once nominated as 'Employee of the Month'. For a couple of months now she has been working in rooms at the back of the hotel which are due to be refurbished within the next year so the fittings and furnishings are not as up to date as some of the other rooms in the hotel.

Tina notices that one of the bedside lamps often ends up on the desk, so she has to move it back to the bedside table, which takes time and is quite tricky as it involves moving the desk and fiddling under the bed. After a while she begins to wonder what is going on because there is already a working wall light above the desk.

She asks other housekeeping assistants if they have ever noticed this and many of them said they have and that it is really annoying because of the time it takes to fix but no one has any ideas about why it happens. One day when she is in a room in the evening, she realises that the reason the lamp is being moved is because the wall light is very dim and that guests need the extra light if they are sitting at the desk.

Tina points this out to the others and they try to think what they can do about it. They think that perhaps the bulb can be changed for a higher wattage one or perhaps a lamp can be put on the desk permanently. She changes the bulb but things aren't much better as the problem is really that the lampshade is too thick. On the checklist which she fills in every week, she reports the issue. She then decides to talk to her supervisor about it. The supervisor checks and agrees with her. She thinks the best solution is to add a table lamp and she mentions the issue to her manager so that it will be dealt with in the refurbishment.

## TTHICS02A      Share ideas in the workplace

### Unit Descriptor

This competency standard covers the skills required to share idea/s with others in the workplace throughout the hospitality, tourism and caravan industry. This entails being confident in idea/s, selecting the most appropriate method to communicate it, accepting feedback and identifying areas for improvements.

This competency standard has been designed to encourage employees to discuss and think about ideas they may have in relation to work practices, services or products in the industry. It relates to entry and operative level positions in the hospitality, tourism and caravan industry in areas such as bars, cafes, gaming venues, caravan parks, tour operators, conference organisers, sales functions in attractions, wineries, ticketing services, tourist information centres.

Element	Performance criteria
<b>1. Clarify idea/s for communication</b>	1.1 Advantages and disadvantages of idea/s are identified.
	1.2 Information relevant to the idea/s is gathered.
	1.3 Effects of the idea/s are identified.
	1.4 Other possible options are considered.
<b>2. Prepare for communication</b>	2.1 Relevant people are identified.
	2.2 Suitable communication method is selected.
	2.3 Suitable time and place for communication is established.
	2.4 Responses are anticipated and support for idea/s is developed.
<b>3. Share idea/s</b>	3.1 Idea/s is presented in appropriate way.
	3.2 Feedback is sought, discussed and accepted.
	3.3 Idea/s is modified accordingly.

## Range of variables

The range of variables explains how this competency standard can be used to share ideas in workplaces in any part of the tourism, hospitality and caravan industry. The variables chosen for training and assessment will depend on the work contexts within the industry.

What are the effects which need to be considered?	The effects will include the people who may be involved, the resources and processes needed to develop and implement the idea/s and the impact on the workplace.
What other options need to be considered?	Other options include considering other ideas and being open to make changes to the original idea.
Who are the relevant people?	Relevant people may include peers, a supervisor, an area leader or a manager.
What suitable communication methods are there?	Communication methods refer to how and when you will present your ideas such as face to face in a team meeting; in an informal discussion or one on one with a specific person; during an informal discussion; in writing, by email or telephone.
How are responses anticipated?	Responses can be anticipated by visualising the meeting or discussion, thinking through both positive and negative aspects of the idea and identifying the questions and viewpoints of others.
What does seeking, discussing and accepting feedback involve?	Seeking, discussing and accepting feedback refers to actively listening, asking questions, clarifying understanding and evaluating, accepting and rejecting the opinions and ideas of others' as appropriate.
What does modifying ideas involve?	Modifying ideas involves making improvements or developing your idea/s based on the feedback received.

## Evidence guide

### What evidence is required to demonstrate competence for this standard as a whole?

Overall competence in this standard requires evidence that individuals can clearly and confidently define an idea/s and express it effectively to others within a work context in the tourism, hospitality and caravan industry. They must show that they can actively listen for both positive and negative feedback and modify their idea/s accordingly.

What specific knowledge is needed to achieve the performance criteria?

Knowledge and understanding are essential to apply this standard in the workplace, to transfer the skills to other contexts and to deal with unplanned events. The knowledge requirements for this standard are:

- selecting appropriate communication methods
- organisational structure, such as who the relevant people in the organisation are and who to notify if there are problems
- evaluation and review procedures.

What specific skills are needed to achieve the performance criteria?

To achieve the performance criteria, some complementary skills are required. These are:

- ability to accept positive and negative feedback
- ability to observe details of people, objects and events
- presentation skills
- ability to experiment with ideas and modify them
- ability to recognise limitations and ask for help where needed
- ability to listen to ideas and opinions of others with an open mind
- ability to ask questions and seek clarification
- ability to follow organisational guidelines or work under supervision.

### What processes should be applied to this competency standard?

There are a number of processes that are learnt throughout work and life which are required in all jobs. They are fundamental processes and generally transferable to other work functions. Some of these are covered by the **7 key competencies**, although others may be added. The questions below highlight how these processes are applied in this competency standard. Following each question a number in brackets will indicate the level to which the key competency needs to be demonstrated where **0** = not required, **1** = perform the process, **2** = perform and administer the process and **3** = perform, administer and design the process.

- |   |  |
|---|--|
| 1. How can communication of ideas and information (2) be applied? | By discussing ideas with colleagues, peers, supervisors or managers. |
| 2. How can information be collected, analysed and organised (2)?  | By collecting relevant information that may expand or confirm ideas. |
| 3. How are activities planned and organised (2)?                  | By planning and organising own work and time to reflect on ideas.    |

- |    |  |   |
|----|--|---|
| 4. | How can team work (2) be applied?                                    | By discussing ideas with colleagues or supervisors team work can be applied.  |
| 5. | How can the use of mathematical ideas and techniques (0) be applied? | Mathematical ideas and techniques are not essential to this unit but may be applied depending on the work context and ideas that are generated. |
| 6. | How can problem solving skills (2) be applied?                       | Problem solving skills may be applied when defining ideas and making improvements.  |
| 7. | What technology (1) might be used?                                   | Different technologies may be used to communicate the idea/s.   |

**Are there other competency standards that could be assessed with this one?**

This competency standard should be assessed with other standards that make up a specific job function for a specific context within the tourism, hospitality and caravan industry. Standards may include:

THHHBF09B Provide responsible service of alcohol  
THHADG03B Provide responsible gambling services  
THHBFB03B Provide food and beverage service  
THHBFB12A Provide and serve espresso coffee  
THHGFA01B Process financial transactions  
THHGCS02B Promote products and services to customers  
THTLAN0112A Conduct basic oral communications in a language other than English (Japanese)  
THHGGA02B Perform office procedures  
THTFGT01B Work as a guide  
THTFAT07B Provide a site briefing or scripted commentary

**How does this standard work in practice?**

Freya has been working as a bar attendant for six months. One day the regular beer delivery went astray and instead of their usual product, the bar received a new 'designer' beer. As they were very low Freya had no choice but to accept it and was surprised to find that it sold really well even though it was a little more expensive. In fact it sold faster than their usual product. The following week they received their usual product again but their regular customers asked for the new beer.

Although ordering in new product was the manager's responsibility, Freya decided to look into it a bit more before talking to the manager. She looked into the pricing, talked to the distributor and found out that they could get a better price on bigger orders. She also went into similar bars to see whether they stocked it and found out not only that they did but that there was a whole range of other products which looked really good.

One afternoon when the manager came in for a regular meeting when the bar was quiet, Freya mentioned the new product and suggested that they should stock the new beer. She was able to give the manager the figures she'd got. The manager was very interested and said he'd noticed the new product range but hadn't thought it would work in the bar. He told Freya he would order the new



beer and asked her to look into the other products as well, maybe bring them in on a trial basis and they would make a decision together after a month or so.

The new beer continued to sell well and they decided after a month to add a few of the other products also.

**THHICS03A****Develop innovative ideas at work****Unit Descriptor**

This competency standard covers the skills required to systematically generate and develop innovative ideas in the workplace. It is a generic standard which may be customised for different work contexts within the tourism, hospitality and caravan industry.

This competency standard requires the skills to interpret or observe a need and develop a detailed idea. This requires the creative generation and discussion of a number of ideas or solutions and accepting positive and negative feedback. Ideas should be tested in order to establish and present a workable outcome which meets the needs of the end user.

This is a core standard of competency and should be completed by anyone in the tourism, hospitality and caravan industry above entry and basic operational levels, including managers and senior managers. Its six elements cover all six *innovation @ work* skills which are central to innovative thinking.

**Element****Performance criteria**

- |   |  |
|---|--|
| <b>1. Interpret the need for innovation</b> | <ul style="list-style-type: none"><li>1.1 The need, brief or opportunity for innovation within workplace context is recognised.</li><li>1.2 Assumptions about products/processes are challenged to identify opportunities for innovation.</li><li>1.3 Possible future contexts and environments for the innovation are projected.</li><li>1.4 End user requirements are identified.</li><li>1.5 Resources and constraints are identified.</li><li>1.6 Factors and ethical considerations that may impact on the idea are researched.</li><li>1.7 Relevant organisational knowledge is accessed.</li><li>1.8 Desired outcomes from innovation are identified.</li></ul> |
| <b>2. Generate a range of ideas</b>         | <ul style="list-style-type: none"><li>2.1 Ideas are conceptualised using a range of creative thinking techniques.</li><li>2.2 Relevant knowledge to explore a range of approaches is applied.</li><li>2.3 Stimulation from alternative sources is sought.</li><li>2.4 Ideas are tested against the brief and other factors.</li><li>2.5 Preferred idea/s is selected.</li></ul>  |

- |                                   |   |
|-----------------------------------|---|
| <b>3. Collaborate with others</b> | 3.1 Idea/s is developed in conjunction with relevant people.<br>3.2 Feedback is sought and accepted from relevant people in an appropriate fashion.<br>3.3 Idea/s is modified according to feedback.<br>3.4 A network of peers is established, maintained and utilised to develop the idea/s. |
| <b>4. Reflect on idea/s</b>       | 4.1 Idea/s is analysed from different perspectives using structured reflection.<br>4.2 Appropriate strategies are used to capture reflections.<br>4.3 Time is allowed for the development and analysis of idea/s.<br>4.4 Reflections are utilised to improve the idea/s.                      |
| <b>5. Represent idea/s</b>        | 5.1 An appropriate communication method is selected for the target audience.<br>5.2 The presentation of the idea/s is developed with the audience in mind.<br>5.3 The idea/s is presented to educate/inform the client.<br>5.4 The idea/s is modified according to client feedback.           |
| <b>6. Evaluate the idea/s</b>     | 6.1 The idea/s is reviewed using appropriate evaluation methods to ensure it meets required needs.<br>6.2 The idea/s is modified as required.   |

### Range of variables

The range of variables explains how this competency standard can be used to apply innovative work skills in workplaces in any part of the tourism, hospitality and caravan industry. The variables chosen in training and assessment will depend on the work contexts within the industry.

What is innovation?

Innovation is the process of generating new ideas or solutions, or new uses for old ideas and making them useful or a means of improvement.

What are the user requirements?

The user requirements refer to who will be using the end product? Why is it needed? How will it be used? What advantages will it provide? Where it will be

	used?
What assumptions may be challenged?	Assumptions can be about any convention in the workplace and might include work process, product, materials, system, tools, working conditions.
What factors might impact on the idea?	These might include aesthetic requirements, functionality, information available, OH&S and environmental considerations, budget, client preferences and so on.
What creative thinking techniques can be used?	Creative thinking techniques include brainstorming, visualising, making associations, building on associations, telling stories, creative writing, lateral thinking games, mind mapping, drawings, Six Thinking Hats and using prompts.
How can relevant knowledge be applied?	Relevant knowledge refers to technical knowledge, information gained from books, videos, knowledge from different work areas and work colleagues.
What alternative sources need to be considered?	Stimulation from alternative sources might come from reading books and industry journals, talking with colleagues and friends, visiting library's and going to industry workshops and networks.
Who are relevant people?	Relevant people might include colleagues, team members, supervisors, managers and clients.
How can a network of peers be maintained?	Maintaining a network of peers can include participating in forums, participating in industry training, attending workshops or becoming a member of a network.
What types of communication techniques are there?	Communication techniques refer to how you will present your ideas. For example, writing a proposal, building a model, showing a film, presenting a talk, preparing a report or drawing a diagram.
What does educating the client involve?	Educating the client refers to helping the client visualise and understand the idea/s and involves actively listening, asking questions, accepting their opinion, explaining the proposal and clarifying the details.

How might the idea be reviewed?	Reviewing the idea might involve checking that the idea can be implemented, that it meets the client/end user needs, best practice, financial requirements and so on.
---------------------------------	---

What evaluation methods can be used?	Evaluation methods might include developing checklists, discussing the process with colleagues or supervisors or writing a report of the outcomes.
--------------------------------------	--

## Evidence guide

### What evidence is required to demonstrate competence for this standard as a whole?

Overall competence in this standard requires evidence that the individual can accurately interpret a brief and develop a detailed and appropriate outcome for their own area of work within the tourism, hospitality and caravan industry. This requires the creative generation of a number of ideas or solutions, being able to discuss these while accepting positive and negative feedback. Ideas should be critically analysed in order to establish and present a workable outcome which meets the need of the end user within specific contexts in the tourism, hospitality and caravan industry.

What specific knowledge is needed to achieve the performance criteria?	<p>Knowledge and understanding are essential to apply this competency standard in the workplace, to transfer the skills to other contexts and to deal with unplanned events. The knowledge requirements for this standard are:</p> <ul style="list-style-type: none"> <li>• relevant technical, job and industry knowledge</li> <li>• knowledge of organisational culture</li> <li>• knowledge of social, environmental and work culture impacts</li> <li>• knowledge of principles of innovation</li> </ul>
--	--

What specific skills are needed to achieve the performance criteria?	<p>To achieve the performance criteria, some complementary skills are required. These are:</p> <ul style="list-style-type: none"> <li>• research skills</li> <li>• active listening</li> <li>• interpersonal skills</li> <li>• network skills</li> <li>• team work</li> <li>• lateral thinking</li> <li>• the ability to analyse self and external factors</li> <li>• time management skills.</li> </ul>
--	--

### What processes should be applied to this competency standard?

There are a number of processes that are learnt throughout work and life which are required in all jobs. They are fundamental processes and generally transferable to other work functions. Some of these are covered by the **7 key competencies**, although others may be added. The questions below

highlight how these processes are applied in this competency standard. Following each question a number in brackets will indicate the level to which the key competency needs to be demonstrated where **0** = not required, **1** = perform the process, **2** = perform and administer the process and **3** = perform, administer and design the process.

- |   |  |
|---|--|
| 1. How can communication of ideas and information (2) be applied?       | For example, sharing ideas with others, presenting ideas to the client and obtaining feedback.   |
| 2. How can information be collected, analysed and organised (2)?        | For example, seeking or researching information from the client and other relevant sources.      |
| 3. How are activities planned and organised (2)?                        | For example, planning and organising steps to be undertaken to develop idea.                     |
| 4. How can team work (2) be applied?                                    | For example, collaborating with others and sharing knowledge to develop the idea and present it. |
| 5. How can the use of mathematical ideas and techniques (1) be applied? | For example, analysing data and generating graphs, designs and measurements to test out ideas.   |
| 6. How can problem solving skills (2) be applied?                       | For example, identifying resources and materials needed and how to obtain them.                  |
| 7. What technology (1) might be used?                                   | For example, using computers and other relevant equipment.                                       |

### **Are there other competency standards that could be assessed with this one?**

As this competency standard is a core standard, it may be assessed with any other standards that make up a specific job function for a specific context within the tourism, hospitality and caravan industry. It is probably of most use at AQF level 3 and above.

### **How does this standard work in practice?**

Steve is an experienced guide working on an island resort. He has been there for about 18 months. The resort offers many diverse activities to its clients which include families with young children as well as young adults looking for adventure and fun. Steve mainly does wildlife tours both during the day and at night.

After an enjoyable night tour, one of the clients said she could keep walking all night. This got Steve thinking about different kinds of tours which would involve camping out for a few nights, so that he could really exploit the island's unique features. He asked his colleagues whether there had

ever been any other types of tours at the resort. They didn't know of any and Mai, another guide said she was interested in looking into the idea. They mentioned this at a staff meeting and their manager thought it had potential but needed a lot of work. A few more people got involved, so Steve suggested they all look into a different aspect of the issue. Together they found out about previous history of tours, researched what was available at similar resorts, talked to clients about what other tours they would consider taking, and looked at other issues such as cost and timing, so that they developed a list of criteria for the new tours.

Over a period of time, they came up with several new tour ideas, all involving camping out for a few nights so they could see a lot more than on their current daytime or night tours. They then had to become more specific and select the best ideas. They decided to focus on four possible camping tours, walking and driving and for different periods of time, two focusing on water and the sea and two on wildlife and flora. They talked to a lot of people, including the Marketing Department about the new tour ideas and took on board their feedback. After coming up with four detailed plans, they reviewed them in relation to the criteria they had established and made some changes.

When they felt ready, they presented the four ideas to the Activities Manager, Marketing Manager and the Resort Manager at a meeting during a quiet period. They had planned this carefully and were both creative and practical, using slides and photos, schedules, and maps but also incorporating projected levels of business, costs and other financial information because they knew profitability was an issue in a competitive marketplace.

The managers asked a lot of questions which the team had already thought about so they were able to answer most of them. The consensus was that two of the four tours could go ahead on a trial basis, as they would attract new clients and add value to the resort's activities. They wanted both ideas to be carefully evaluated again before implementation.

## THHICS04A

## Originate and develop a concept

### Unit Descriptor

This standard has been developed for people whose job specifically involves designing products or services, concepts or packages in any part of the tourism, hospitality and caravan industry. It might be used by someone designing a new entertainment concept, a new hospitality product, a new tour product, a new client package for a hotel/resort, a new style of cuisine for a restaurant or food outlet, a new type of recreational vehicle, a quality control program, a marketing campaign, convention package and so on.

The standard relates to supervisory and management positions in enterprises such as hotels, restaurants, tour operators, tour guiding operations, attractions and theme parks, resorts, wineries, all areas of the caravan industry and so on.

The standard describes the skills and knowledge required for working with and developing a concept to that stage where it becomes the basis of a creative and effective product, service or process. It covers both the response to a brief or the development of a self-initiated proposal. It does not describe the skills needed for presentation of the proposal which are covered by other units

### Element

### Performance criteria

**1. Interpret the brief or clarify need or opportunity**

- 1.1 The brief, need or opportunity for innovation is explored. The context for the new product or service is investigated and clarified and the audience/user is determined.
- 1.2 The purpose, desired outcome or end product, broad content, style, cost, intended audience and other relevant factors of the brief, need or opportunity are clarified.
- 1.3 The purpose, goals, constraints and requirements of the final product/service/process are specified.

**2. Develop a range of creative approaches**

- 2.1 A range of different, innovative and creative approaches and concepts is generated.
- 2.2 Different approaches/concepts are reviewed for feasibility, innovation, creativity, and acceptability to client or audience.
- 2.3 Possible constraints are identified and the approaches/concepts are checked against these to determine feasibility.



- 2.4 The social, ethical and environmental impacts of the approaches/concepts are taken into consideration.
  - 2.5 The effects and advantages of various combinations of activities, systems, processes, staff, materials for achieving a creative, innovative and appropriate outcome are investigated.
  - 2.6 The concept(s) or approach (es) that achieve the required outcome in an innovative and feasible way are selected and draft proposals representing those approaches are documented in an appropriate format.
- 3. **Seek opinions of colleagues and a range of creative and technical experts/specialists**
  - 3.1 Proposals are discussed with colleagues and specialists.
  - 3.2 Creative and technical aspects of the proposals are clarified and expert advice sought where required.
  - 3.3 Proposals are compared with best practice examples of similar products, services or processes.
- 4. **Adjust and refine proposal on the basis of advice received and evaluation**
  - 4.1 Determine advantages and disadvantages of each approach/strategy based on criteria such as creativity, appropriateness to the user/audience, cost-effectiveness, level of risk, potential benefits and technical feasibility.
  - 4.2 Proposals are evaluated and the approach which will result in achieving the desired outcome is selected.
- 5. **Develop the concept to an operational level**
  - 5.1 A detailed specification for the product in terms of creativity, the audience/user, budget, and technical requirements is developed.
  - 5.2 The detailed specification is presented to the relevant parties for approval, funding or endorsement.

## Range of variables

The range of variables explains how this competency standard can be used in the development of a concept to the stage where it can be the basis of a creative, practical, effective and appealing product or service which satisfies the purpose for which it was designed. The variables chosen in training and assessment will depend on the work contexts within the tourism, hospitality and caravan industry.

What types of products or services would be designed?

Products might include hospitality products, tour products, marketing campaigns, restaurant or food outlet concepts and so on.

What would the purpose of the product or service be?

Purposes of the product may include provision of services to clients within the tourism, hospitality and caravan industry.

What formats would be used to document the proposal?

Formats for documentation may include proposals to be submitted to a funding body or sponsor, briefs for a consultant, descriptions of a creative proposal for in-house consideration.

Who should be consulted in the development of the proposal?

Appropriate personnel to consult may include any staff who may be involved in the design or the implementation of the process, as well as technical specialists, creative and administrative staff. Sources external to the organisation should also be consulted.

What factors should be taken into account when determining the outcome of the concept?

Factors to be considered may include cost effectiveness, technical feasibility, audience/user characteristics, level of skill and understanding required for implementation, resource requirements, need for additional staff training, access to technology.

What are the resources required to produce the product or develop the service?

Resources and equipment may include all the specialist staff required for successful development of the proposed product or service, computers (hardware and software), and others depending on the outcome required.

What are the constraints to the project?

Constraints to the project may include cost, finance, time, availability of skilled experts and personnel, equipment and technical difficulty.

What aspects of the work

Project specifications may include purpose, audience,

would be covered by the project specifications?

time, budget, resources (human, plant and equipment), ownership of final product and operational plan.

## Evidence guide

### What evidence is required to demonstrate competence for this standard as a whole?

Competence in this standard requires evidence that creative and effective concepts can be generated and evaluated. An original idea must be able to be translated into a concrete proposal. The proposal needs to be documented and reviewed using appropriate methods.

What specific knowledge is needed to achieve the performance criteria?

Knowledge and understanding are essential to apply this standard in the workplace, to transfer skills to other contexts and to deal with unplanned events.

The knowledge requirements for this standard are:

- knowledge of past history of work in related areas
- knowledge of the social and environmental effects of possible approaches
- specialist knowledge relating to issues within the specific work contexts within the tourism, hospitality and caravan industry
- technical principles and knowledge appropriate to the area covered by the concept
- communication principles
- the variety of methods and materials available

What specific underpinning skills are needed to achieve the performance criteria?

To achieve the performance criteria, some complementary skills are required. These skills are:

- the ability to use creative techniques to generate a range of innovative ideas
- the ability to communicate with a wide range of people
- research skills
- relevant technical knowledge
- appropriate ways of documenting creative proposals

### What processes should be applied to this competency standard?

There are a number of processes that are learnt throughout work and life which are required in all jobs. They are fundamental processes and generally transferable to other work contexts. Some of these are covered by the **7 key competencies**, although others may be added. The questions below highlight how these processes are applied in this competency standard. Following each question a number in brackets indicates the level to which the key competency needs to be demonstrated where **0** = not required, **1** = perform the process, **2** = perform and administer the process and **3** = perform, administer and design the process.

1. How can

Communication is an essential part of the whole

- |   |  |
|---|--|
| communication of ideas and information (3) be applied?                  | standard and will be used in a number of ways, including with the client, colleagues and experts.  |
| 2. How can information be collected, analysed and organised (3)?        | Information to support the concept will be collected, analysed and organised to form the basis of the proposal.  |
| 3. How are activities planned and organised (3)?                        | The design of the product will be done in a logical way with opportunities for discussions with colleagues and specialists both artistic and technical and time for review of the final concept proposal.  |
| 4. How can team work (1) be applied?                                    | The development of the proposal will require cooperation with the team to develop the proposal to the stage where it can be presented to an internal or external sponsor, to a marketing or other department, to a client, a funding body and so on. |
| 5. How can the use of mathematical ideas and techniques (3) be applied? | Some use of mathematical techniques may be required in developing budgets/estimated costs of the proposal.   |
| 6. How can problem solving skills (3) be applied?                       | Problem solving skills may be required in developing a proposal that is creative, innovative and yet feasible and in overcoming technical problems.  |
| 7. How can the use of technology (3) be applied?                        | The medium selected for the final product will determine the type and use of technology.   |

**Are there other competency standards that could be assessed with this one?**

This competency standard could be assessed on its own or in combination with other competencies relevant to the job function within the tourism, hospitality and caravan industry work context. The other standards would probably most appropriately be at AQF level 4 and above.

**How does this standard work in practice?**

Maria has just started a new job as Tourism Marketing Manager for a country region. The area is beautiful and has a lot of tourist potential but has never been properly promoted. Her job is to design a promotional strategy and a marketing plan for the area.

She begins by looking at other regions, both similar and totally different ones, to see how they promote themselves. She also sees what country regions overseas do. To get a different perspective

she investigates city tourism operations as well to see if they have approaches which could be useful in the country. She gradually puts a clear brief together for herself about what the strategy has to achieve, what specific outcomes are expected and keeps refining that as she receives more information. She makes sure to get feedback from her manager.

She makes a point of challenging assumptions about what can and can't be seen as a tourist attraction and what marketing approaches are valid. Do they need events or festivals to act as a focus? Are there any well-known people from the area who could act as ambassadors or be the faces of campaigns? Should these people vary from state to state? What are the countries of origin of the people who currently live in the area? Should they make strategic links with these or other countries?

She puts herself in the shoes of a potential tourist and imagines being a backpacker, an elderly couple, a young person who wants to have a good time, a family with young children. What does each group need and want? What can the region offer them? She wonders whether they should present themselves as having something for everyone or aim at a narrower market.

She talks to her network and her colleagues. She makes a particular effort to have discussions as widely as possible, both to inform herself before she starts to design her concept and once she has ideas on which she needs feedback. She talks to former colleagues, people in other regions, marketing specialists, tour operators, people who live in the area, tourists already visiting. She has extensive and regular contact with tourism operators in the industry and with all the stakeholders, from hotels to cafes to tourist offices.

Once she has come up with a concept she leaves herself plenty of time to reflect on it, asking herself hard questions, going back to her brief and seeing if the plan really meets those criteria she established. She takes note of the feedback she gets and makes changes if she thinks it is valid.

Once she has a working plan, she develops a presentation for her team including her manager and stakeholders to make sure that everyone will support the strategy and the plan and incorporates their feedback before beginning implementation.

## THHICS05A

## Lead a team to foster innovation

### Unit Descriptor

This competency standard covers the skills and knowledge required to lead a workplace team in ways that foster innovative work practices in any part of the tourism, hospitality and caravan industry. It covers the skills that are needed by individuals who are leading work teams on individual projects or in work in general.

The skills cover the requirements for encouraging innovation within individual team members as well as a team as a whole. They include how to put a team together and keep it working well, how to structure work and monitor its progress, how to ensure that the staff have the information and skills they need and how to apply *innovation @ work* skills to the leadership role.

This competency standard relates to employees working within a supervisory or management position in any part of the hospitality, tourism and caravan industry. This may include areas such as hotels, restaurants, kitchens, cafes, gaming venues, tour operators, conference organisers, attractions and theme parks, caravan parks, wineries, tourist information centres. This may include managing a team within an office, at an attraction, in a kitchen, on a restaurant floor, in a gaming venue, in the front office or back office of a hotel or a caravan park, in housekeeping, conventions and catering or other departments of a hotel, managing an events team, a team of guides in the field, a maintenance team, a sales team within a merchandise sale outlet and so on.

### Element

### Performance criteria

- |  |   |
|--|---|
| <b>1. Provide a model of innovative practice</b> | <ul style="list-style-type: none"><li>1.1 The value placed by the organisation on innovation is promoted and reinforced.</li><li>1.2 Case studies and examples of the use and benefits of innovative work practices within teams are shared with team members.</li><li>1.3 An example of the way <i>innovation @ work</i> skills can be applied is provided by the team leader.</li><li>1.4 The qualities of an effective team member are demonstrated by the team leader in working with the team.</li></ul> |
| <b>2. Organise teams to maximise innovation</b>  | <ul style="list-style-type: none"><li>2.1 The performance requirements for the team are analysed.</li><li>2.3 Information is gathered about team members.</li><li>2.4 Strengths and weaknesses of individual team members are acknowledged.</li><li>2.5 Team roles are assigned to ensure a match between work requirements and individual team members' capacities.</li><li>2.6 Team members are selected to foster cross fertilisation of ideas.</li></ul>  |

- |  |   |
|--|---|
| <b>3. Organise work assignments within team to facilitate innovative practices</b>     | <ul style="list-style-type: none"><li>3.1 Work is structured and organised to enable the use of <i>innovation @ work</i> skills.</li><li>3.2 Work assignments are communicated to team members in ways that encourage and reinforce team-based innovation.</li><li>3.3 Tasks and activities are allocated to ensure the best use of team skills.</li><li>3.4 Work assignments include timelines that allow for innovation.</li></ul>  |
| <b>4. Provide guidance and coaching to team members on innovation in the workplace</b> | <ul style="list-style-type: none"><li>4.1 Team members are encouraged to work collaboratively on work assignments.</li><li>4.2 Team members are encouraged to share work information, knowledge and experiences in their day-to-day work.</li><li>4.3 Team members are encouraged to seek external stimuli and knowledge and to set up and maintain networks.</li><li>4.4 Appropriate guidance is provided to team members on the use of <i>innovation @ work</i> skills.</li><li>4.5 Team members are coached to ensure they have the enabling skills to implement <i>innovation @ work</i> skills.</li></ul>  |
| <b>5. Monitor the team's ongoing use of <i>innovation @ work</i> skills.</b>           | <ul style="list-style-type: none"><li>5.1 Team members are actively encouraged to reflect on activities and opportunities for improvement and innovation.</li><li>5.2 Team activities are evaluated based on feedback from team members, management, clients and other interested people.</li><li>5.3 Suggestions for work improvements made by team members are positively received and acted upon where appropriate.</li><li>5.4 Reviews of the application of <i>innovation @ work</i> skills are recorded and presented as appropriate.</li><li>5.5 The innovation process is reviewed and both positive and negative outcomes are discussed and constructively analysed.</li></ul> |

- |  |  |
|--|--|
| <p><b>6. Provide feedback on the use of <i>innovation @ work skills</i>]</b></p> | <p>6.1 Team members are debriefed after work, training and evaluation exercises.</p> <p>6.2 Feedback from review processes are discussed within the group and are used to inform future planning.</p> <p>6.3 Successful innovations are celebrated in appropriate ways.</p> <p>6.4 Problems in the use of <i>innovation @ work skills</i> are discussed in a constructive way.</p> |
|--|--|

## Range of variables

The range of variables describes how this competency standard could be used by a manager or team leader in an organisation in any part of the tourism, hospitality and caravan industry that actively supports and encourages innovation. The variables chosen in training and assessment will depend on the work contexts within the industry.

<p>What information should be gathered about team members?</p>	<p>In order to match work activities to the team member, it is important to have information about individuals, which might include work preferences, past jobs, interests, working styles, lifestyle preferences.</p>
--	--

<p>What are innovation @ work skills?</p>	<p><i>innovation @ work skills</i> are the skills required to come up with and develop new ideas or the new use of an old idea. They are: interpretation, generation of ideas, collaboration, representation, reflection and evaluation.</p>
---	--

<p>What type of external stimuli and knowledge might be useful?</p>	<p>This could come from other organisations, journals, the Internet, networks or technical experts, in Australia or overseas.</p>
---	---

<p>What type of guidance would be provided?</p>	<p>Guidance could include coaching, mentoring, counselling, skills training, modelling.</p>
---	---

<p>What type of work and team activities can benefit from innovative work practices?</p>	<p>Most work activities can benefit from the application of <i>innovation @ work skills</i> including coming up with new ideas for products, processes, services, systems, tools, work practices in all fields of work within the tourism, hospitality and caravan industry.</p>
--	--

<p>What is relevant evidence to be used in a review?</p>	<p>Relevant evidence might include feedback from team members or other staff, from clients or managers, work-related statistics and reports.</p>
--	--



What are the ways that encourage and reinforce team-based innovation?

The team leader can encourage team-based innovation in many ways, for example, through supportive communication, allowing follow-through with ideas, providing enough but not too much guidance and structure, providing training and learning opportunities.

Who may be consulted and involved in innovative work activities?

They may include supervisors, team members, peers, clients, the learners or subject experts.

What are the qualities of an effective team member?

These qualities might include the capacity to be fair, responsible, collaborative, reflective, sympathetic, equitable and hardworking.

What are the ways of rewarding and promoting innovation?

Innovation can be rewarded through positive feedback, presentation to peers and higher management, articles in newsletters, well-planned group incentive schemes and so on.

## Evidence guide

### What evidence is required to demonstrate competence for this standard as a whole?

A person who demonstrates competence in this standard should be able to provide evidence that they have the skills and knowledge to provide leadership to a group or work team in a way which encourages the individual and team application of *innovation @ work* skills within specific job contexts in any part of the tourism, hospitality and caravan industry

What specific knowledge is needed to achieve the performance criteria?

Knowledge and understanding are essential to apply this competency standard in the workplace, to transfer the skills to other contexts and to deal with unplanned events. The knowledge requirements for this standard are:

- a knowledge of *innovation @ work* skills
- an understanding and commitment to innovation
- an understanding of leadership principles
- a knowledge of techniques for evaluating team performance
- an understanding of group dynamics in a team
- knowledge of coaching and learning principles

**What specific skills are needed to achieve the performance criteria?**

To achieve the performance criteria, some complementary skills are required. These skills are:

- ability to apply *innovation @ work* skills in own

- work
- interpersonal skills
- communication and leadership skills
- motivational skills
- coaching skills
- counselling and consoling skills
- conflict resolution skills
- evaluation skills
- ability to give and receive feedback
- listening skills; and
- matching staff competence to task requirements.

### What processes should be applied to this competency standard?

There are a number of processes that are learnt throughout work and life which are required in all jobs. They are fundamental processes and generally transferable to other work functions. Some of these are covered by the **7 key competencies**, although others may be added. The questions below highlight how these processes are applied in this competency standard. Following each question a number in brackets indicates the level to which the key competency needs to be demonstrated where **0** = not required, **1** = perform the process, **2** = perform and administer the process and **3** = perform, administer and design the process.

- |   |  |
|---|--|
| 1. How can communication of ideas and information (3) be applied?       | It can be applied, for example, when collaborating with and guiding the team, providing feedback, planning work activities and assigning tasks, celebrating success.         |
| 2. How can information be collected, analysed and organised (3)?        | For example, in the evaluation of team performance, and the matching of team members to work tasks.  |
| 3. How are activities planned and organised (3)?                        | Planning is central to a team leaders' role both in terms of planning and organising the team's work as well as organising team activities in a way that fosters innovation. |
| 4. How can team work (3) be applied?                                    | The team leader plays a pivotal role in the team ensuring the cultivation of a team culture that encourages innovation, problem solving and team performance evaluation.     |
| 5. How can the use of mathematical ideas and techniques (2) be applied? | Mathematical ideas would need to be applied in planning team activities and calculations arising in the course of day-to-day work.   |
| 6. How can problem solving  | Problem solving would be applied to scheduling and   |

skills (2) be applied?

assignment of the team and conflict resolution.

7. How can the use of technology (1) be applied?

Technology might be used in the team's day-to-day work activities, to communicate ideas and information, as well as to access and analyse information.

### **Are there other competency standards that could be assessed with this one?**

This competency standard could be assessed on its own or in combination with other standards relevant to management functions within a specific context in any part of the tourism, hospitality and caravan industry.

### **How does this standard work in practice?**

Jianni works as the team leader in an animal enclosure within a theme park. His team has to work closely together to prepare for customers, monitor, clean, maintain and close the enclosure, use and maintain equipment appropriately, as well as keeping appropriate documentation.

Jianni takes his role as team leader seriously and is committed to the principles of continuous improvement and innovation. He has trained all his staff in *innovation @ work* skills. He holds regular brief morning meetings with the team at which all team members are encouraged to challenge how things are done and to come up with new and different ways of doing things in relation to any aspect of the job, from dealing with the public to cleaning the enclosures. Jianni leads by example, participating in the discussions, listening attentively to others, sharing ideas and celebrating with the team when the team comes up with a more efficient or safer way of doing a job or resolves a problem.

Jianni endeavours to be sensitive to team members who may have problems and provides them with support, guidance and help when needed. When interpersonal problems occasionally arise in the group, he uses appropriate conflict resolution techniques. He monitors his team's performance both in its day-to-day work, as well as its achievements in innovation and work improvements. He tries to assign team members to tasks that match their skills as much as possible. He looks for opportunities for innovation and ways in which team members can help each other and work collaboratively. He encourages them to look for ways of working smarter, safer and more efficiently.

**THHICS06A****Create an innovative work environment****Unit Descriptor**

This competency standard covers the skills and knowledge required to create a workplace environment that enables and supports the application of innovative practices within the hospitality, tourism and caravan industry. This may include such areas as hotels, restaurants, kitchens, cafes, gaming venues, tour operators, conference organisers, attractions and theme parks, caravan parks and manufacturers, wineries, tourist information centres and so on.

The work environment includes all aspects of the workplace including working conditions and practices, management practices, physical layout and training and education. This unit relates to management-level jobs in any work context within hospitality, tourism and caravan establishments. It is particularly applicable to managers of small businesses or business units or departments within larger organisations.

**Element****Performance criteria****1. Implement work practices and procedures to support innovation**

- 1.1 Working conditions are established which encourage the application of innovation in the workplace.
- 1.2 Processes are implemented to maximise the use of *innovation @ work* skills.
- 1.3 Workplace procedures are introduced and maintained to foster the application of innovation in the workplace.
- 1.4 Collaborative work arrangements are facilitated to foster innovation.

**2. Implement management practices to support innovation**

- 2.1 The development of new ideas is actively supported and guided.
- 2.2 All ideas are positively received and constructive advice provided.
- 2.3 Relationships based on mutual respect and trust are established and maintained between management and staff.
- 2.4 Innovative work practice is exemplified in the way management approaches work and team responsibilities.

- |   |  |
|---|--|
| <b>3. Promote innovation in the workplace</b>                                 | 3.1 Staff's suggestions, improvements and innovations are acknowledged.<br>3.2 Innovation is celebrated and promoted by appropriate means.<br>3.3 The value placed by management on innovation is promoted and reinforced, in spite of the potential risks.  |
| <b>4. Create a physical environment which supports innovation</b>             | 4.1 The physical environment is decorated to maximise creativity.<br>4.2 Workspaces are designed to encourage the cross fertilisation of ideas as well as the application of <i>innovation @ work</i> skills.<br>4.3 The workspace is designed to provide for the development of relationships between all members of the workforce within organisations in the tourism, hospitality and caravan industry. |
| <b>5. Provide information and learning opportunities to foster innovation</b> | 5.1 Relevant information, knowledge and skills are shared within the organisation.<br>5.2 Formal learning opportunities are provided to help develop skills needed for innovation in the workplace.<br>5.3 Active learning opportunities are created in which managers and staff can learn from the experience of others.  |

## Range of variables

The range of variables describes how this unit could be used in an organisation that actively supports and encourages innovation. The variables chosen in training and assessment will depend on the work contexts within organisations in the tourism, hospitality and caravan industry.

What is innovation?

Innovation is the process of creating a new idea or the new use of an old idea and developing it so it results in improvement.

What are *innovation @ work* skills?

*innovation @ work* skills include interpretation, ideas generation, collaboration, reflection, representation and evaluation.

What type of work activities can benefit from innovative work practices?

All types of work activities could benefit from innovation, including the development of new products, processes, services, programs, tools and

## work practices

What working conditions encourage the application of *innovation @ work* skills?

Working conditions might include flexible working hours, family-friendly leave entitlements, time provided for coming up with ideas, study leave, social leave.

What processes encourage the application of *innovation @ work* skills?

Processes include a structured approach to activities which foster ideas, such as collecting data, future scanning, getting feedback, networking, making suggestions, creative thinking, collaborating.

What collaborative arrangements might apply?

Collaborative arrangements could include working in teams or partnerships, on specific projects within a section, cross section, vertical teams, working with supplier organisations or partner organisations.

What methods for reflection and review would apply?

Methods might include the systematic collection of data, or a less formal review process of work procedures, or building in review to project schedules or working life through staff meetings.

What workplace procedures would help to foster innovation in the workplace?

Workplace procedures might include those relating to staff meetings, training, performance management, project management, client relations, briefing processes and so on.

How can ideas be acknowledged in an appropriate manner?

Appropriate ways of acknowledging successful ideas might include congratulating the project team, providing a newsletter story about the idea, using the idea to help foster other ideas, ensuring management acknowledgment, well-planned group incentive schemes and so on.

What arrangements would apply to the physical environment?

The physical environment might include workstation arrangements, workspace design and décor, relaxation areas, eating areas, external areas, and the location of different sections.

What information and learning opportunities might be provided?

Learning opportunities might include formal training or education, informal training, mentoring, coaching, job rotation, information seminars, on-line learning, conferences.

Information might include organisational knowledge,

policies, reports, and information from other parts of the organisation, information about other activities within the organisation.

## Evidence guide

### What evidence is required to demonstrate competence for this standard as a whole?

A person who demonstrates competence in this unit should be able to provide evidence that they have put in place procedures and practices which support and foster innovative work practice within their own work context in the hospitality, tourism and caravan industry. These would include management practices, work practices, procedures, and office layout, project management approaches.

What specific knowledge is needed to achieve the performance criteria?

Knowledge and understanding are essential to apply this unit in the workplace, to transfer the skills to other contexts and to deal with unplanned events. The knowledge requirements for this unit are:

- an understanding of *innovation @ work* skills
- an understanding of basic management principles
- a knowledge of the ways workplace climate can affect employees' attitudes and performance
- an understanding of the benefits of coaching and learning opportunities for employees
- occupational health and safety requirements
- knowledge of factors that can motivate staff to apply innovative work practices
- knowledge of ways of rewarding performance in the workplace.

What specific skills are needed to achieve the performance criteria?

To achieve the performance criteria, some complementary skills are required. These skills are:

- interpersonal skills
- leadership skills
- encouraging supporting employees' achievements (on the use of *innovation @ work* skills)
- accessing interpreting and sharing information
- researching information
- freely discussing ideas and providing

feedback.

### What processes should be applied to this competency standard?

There are a number of processes that are learnt throughout work and life which are required in all jobs. They are fundamental processes and generally transferable to other work functions. Some of these are covered by the **7 key competencies**, although others may be added. The questions below highlight how these processes are applied in this competency standard. Following each question a number in brackets indicates the level to which the key competency needs to be demonstrated where **0** = not required, **1** = perform the process, **2** = perform and administer the process and **3** = perform, administer and design the process.

- |   |  |
|---|--|
| 1. How can communication of ideas and information (3) be applied?       | The communication process is applied in the sharing of ideas and the collaborative development of ideas.   |
| 2. How can information be collected, analysed and organised (3)?        | This process is critical for this unit. It is evident in the information gathered to change layouts and procedures.  |
| 3. How are activities planned and organised (3)?                        | Planning would need to be applied in the provision of learning and coaching opportunities.   |
| 4. How can team work (3) be applied?                                    | Managers, team leaders and employees are encouraged to work collaboratively in applying innovative work practices to organisational activities.  |
| 5. How can the use of mathematical ideas and techniques (2) be applied? | Mathematical ideas would need to be applied in the planning of organisational activities and budgeting of resources.   |
| 6. How can problem solving skills (3) be applied?                       | Problem solving would be applied to overcoming inappropriate aspects of workplace cultures, and resolving conflicts within the section/ organisation being managed.                                  |
| 7. How can the use of technology (3) be applied?                        | The technology might be used to obtain, analyse and share information on innovative work practices and organisations that are examples of good practice in their use (eg Internet, email, computer). |
| 8. Are there any other relevant processes?                              | The application of <i>innovation @ work</i> skills is critical to this unit in that they underpin the processes for innovation.  |



**Are there other competency standards that could be assessed with this one?**

This competency standard could be assessed on its own or in combination with other relevant management units from the tourism, hospitality and caravan Training Package within a specific context in any part of the tourism, hospitality and caravan industry.

**How does this standard work in practice?**

Zara manages an attractions group which has several operations throughout the country. The group is committed to innovation as a part of its strategic business goal and has innovation initiatives. The companies which form part of the group are encouraged to share their innovations and there are annual innovation awards in place. Within the company, employees are encouraged to put their ideas to a committee which decided whether to pursue them.

Zara thinks that the existing initiatives are good but she feels that innovation is not systematically built in to the organisation's working life and work environment. She decides to make some changes to the work environment to ensure that innovation is fostered. The first thing she organises is training for all staff members in *innovation @ work* skills. This is conducted by an external facilitator over a two day workshop. To put the skills into practice immediately, the facilitators work with the participants on a project relevant to their work.

Zara and her team then conduct some research to find out what work practices and procedures are currently followed in their workplace and how they support innovation. They find a mixed picture and decide to make some changes. They brainstorm ideas to design new procedures and practices which will encourage and support innovation. These include more collaborative approaches to projects, encouraging networking opportunities and setting up creative think tanks.

Zara also develops some new management practices for her to follow to ensure she is encouraging staff to use *innovation @ work* skills. These include opportunities for people to present new ideas, ways in which she can recognise and possibly reward innovation, methods of identifying learning opportunities, and ways she can demonstrate to staff that the organisation truly supports and encourages innovation.

**THHICS07A****Set up systems that support innovation****Unit Descriptor**

This competency standard covers the skills and knowledge required to conceptualise and design new systems that develop and support innovation in the workplace. The systems might be those that apply to human resource management, team management, organisational structures, product development, marketing or training and assessment. The systems can apply in any type and size of organisation within the tourism, hospitality and caravan industry including hotels, restaurants, kitchens, cafes, gaming venues, tour operators, travel agencies, conference organisers, attractions and theme parks, caravan parks and manufacturers, wineries, tourist information centres and so on.

**Element****Performance criteria**

- |  |  |
|--|--|
| <b>1. Conduct research into organisation systems</b> | 1.1 Reasons for incorporating innovation into organisation systems are identified.<br>1.2 Resources and commitment required to implement innovation are identified.<br>1.3 Goals of a new innovative system are clarified.<br>1.4 Innovative systems in other organisations are researched.<br>1.5 Analysis of current organisational systems is carried out to identify gaps or barriers to innovation.<br>1.6 Staff who can support and foster innovation in the new systems are identified. |
| <b>2. Generate innovative system options</b>         | 2.1 Ideas for innovative work systems that will foster innovation are conceptualised using individual and group techniques.<br>2.2 The range of ideas are evaluated and discussed with workers and colleagues.<br>2.3 A system idea is selected that meets the workplace requirements and which is both feasible and innovative.   |
| <b>3. Develop plan for the innovative system</b>     | 3.1 Analysis of the organisational structure is carried out to identify the impact of the new system on people, resources and finances.<br>3.2 Staff throughout the organisation who will be involved with, or affected by, the new system are consulted.<br>3.3 Financial impact of the new system is clarified and funds and resources are allocated.  |

- |   |     |  |
|---|-----|--|
|   | 3.4 | Marketing or promotional strategy is developed to educate the organisation on the new system.                            |
|   | 3.5 | Competencies of the staff who will use the system are evaluated and a learning and development strategy is planned.      |
| <b>4. Trial the innovative work system</b>          | 4.1 | Draft plans for the innovation system are presented to the organisation staff and preliminary feedback is gathered.      |
|   | 4.2 | The new system is trialled with a group within the organisation.   |
|   | 4.3 | The trial is monitored and action is taken to streamline it where required.  |
| <b>5. Review the trial of the innovative system</b> | 5.1 | The innovative system is reviewed in relation to its goals and the ways in which it fosters innovation in the workplace. |
|   | 5.2 | The innovative system is adjusted to reflect evaluation feedback.  |

### Range of variables

The range of variables describes how this competency standard could be used by a manager in a workplace within the tourism, hospitality and caravan industry. The variables chosen in training and assessment will depend on the work contexts within the industry.

What reasons may exist for incorporating innovation into the organisation?

Reasons may include high staff turnover, customer dissatisfaction, for continuous improvement and to increase competitiveness.

What goals may be relevant to this competency standard?

Goals for innovation may include winning more projects, diversifying the business, increasing staff numbers, changing the culture of the organisation or generating more income.

What type of innovative systems could be designed to foster innovation?

Systems may include product review systems, human resource, quality management, innovation reward systems, team management, project management or learning and development systems.

What gaps or barriers might be existing in the organisation?

Barriers may include a hierarchical system of management, staff not being involved in decisions, people not communicating with each other or sharing information, managers who do not accept new ideas or

teams who work in rigid and inflexible ways.

How might staff who can support and foster innovation be identified?

Methods might include surveys, questionnaires, job profile analysis, or observations.

What individual and group techniques may be used to conceptualise options for the new system?

They might include process analysis, cost-benefit analysis, brainstorming, value analysis, SWOT analysis, review of approaches/procedures used by competitors, visual imagining, jotting words, a flow chart, a mind map, or other creative thinking strategies.

How might staff be consulted?

Through interviews, team meetings, email, memos, informal interactions, at every level of the organisation.

What staff competencies may be evaluated to help implement the system?

Competencies will include the skill sets that underpin innovation: that is, interpretation, generating ideas, collaboration, reflection, representation and evaluation. In addition, technical competencies will be required to support the system.

## Evidence guide

### What evidence is required to demonstrate competence for this standard as a whole?

Persons demonstrating competence in this standard should be able to provide evidence that they can design, trial and review more than one work system in more than one context. Each work system should be planned and structured to contribute to the achievement of the organisation's mission and goals and to maximise opportunities for innovation by workers and managers in the workplace. The person also need to have demonstrated an understanding of how and why the work systems concerned fulfil the specified workplace requirements and foster workplace innovation amongst workers and managers.

What specific knowledge is needed to achieve the performance criteria?

Knowledge and understanding are essential to apply this standard in the workplace, to transfer the skills to other contexts and to deal with unplanned events. The knowledge requirements for this standard are:

- principles of innovation
- leadership and management theory
- an understanding of ways in which the system can contribute to innovation in the workplace
- a knowledge of various options for the system; and
- knowledge of *innovation @ work* skills.

What specific skills are needed

To achieve the performance criteria, some

to achieve the performance criteria?

complementary skills are required. These skills are:

- ability to interpret and analyse organisational requirements for work systems
- evaluation of staff competencies
- ability to plan the implementation of new systems
- ability to organise and implement training and learning activities to prepare workers and managers to implement a new work system
- research skills

### What processes should be applied to this competency standard?

There are a number of processes that are learnt throughout work and life which are required in all jobs. They are fundamental processes and generally transferable to other work functions. Some of these are covered by the **7 key competencies**, although others may be added. The questions below highlight how these processes are applied in this competency standard. Following each question a number in brackets indicates the level to which the key competency needs to be demonstrated where **0** = not required, **1** = perform the process, **2** = perform and administer the process and **3** = perform, administer and design the process.

- |   |   |
|---|---|
| 1. How can communication of ideas and information (3) be applied?       | The process of communication is used for collaborating with workers and managers.   |
| 2. How can information be collected, analysed and organised (3)?        | This process is used to gather information about the type of systems to be implemented and the strategies and resources needed to implement them.         |
| 3. How are activities planned and organised (3)?                        | A number of activities need to be planned, for example, the system development processes, system implementation activities, and system review procedures. |
| 4. How can team work (3) be applied?                                    | The development, implementation and review of the work system should be carried out in collaboration with workers and other managers.                     |
| 5. How can the use of mathematical ideas and techniques (3) be applied? | Mathematical ideas would need to be applied in calculating resource requirements and constraints.   |
| 6. How can problem solving skills (3) be                                | Problem solving would be applied to the identification of system requirements, the streamlining of the system   |

- |  |  |
|--|--|
| applied?   | during implementation and the review of the system once implemented.   |
| 7. How can the use of technology (3) be applied? | Technology might be used to document and disseminate information on the work system.   |
| 8. Are there any other relevant processes?       | The application of <i>innovation @ work</i> skills is critical to this standard in that they are used as the process for developing ideas for systems, and they underpin the innovation process. |

### **Are there other competency standards that could be assessed with this one?**

This competency standard could be assessed on its own or in combination with other standards relevant to management functions within a specific context in any part of the tourism, hospitality and caravan industry.

### **How does this standard work in practice?**

Innovation is considered a core value in a leading catering company. It is championed within the company. It is heralded, advocated, protected and even expected. Because of this, every attempt is made to highlight the need for innovation and to equip the staff and the management with the necessary skills to think and act innovatively. The company has developed a clear process and expects all staff to use it. A team environment promotes the generation and exchange of ideas so the innovation initiatives are structured around teams.

The company has an Innovations forum where teams nominate aspects and/or procedures where innovation is needed and how these suggestions can be developed and taken on to the Innovations Board that meets quarterly to assess and approve attempts at innovation. This board decides on the time, resources and money which will be allocated to the suggested innovative undertakings.

Innovation needs are taken into account in the recruitment, so that all staff are aware that their job includes thinking about what they do at work, how they work and how that could be improved, as well as doing the job. New senior managers are put through a two-day course on the process of innovation within the company.

This did not happen overnight. It began with a new CEO who saw innovation as essential for the long-term survival of the company. He began by working with his senior managers so that they understood his vision and incorporated it into the organisation's strategic plan. They identified the goals of a new innovative system and together began the process of setting up systems and planning the implementation of innovation throughout the organisation in a systematic way.

This involved identifying current systems within the organisation and analysing them to identify whether they would support or hinder innovation. In the process they identified staff who were ready to support and foster innovation and then set up teams to generate ideas for innovative work systems to foster innovation in all areas of the organisation. This ranged from the recruitment process (if they needed staff with initiative were they recruiting for initiative?) to the structure of work teams (did supervisors have enough authority to find immediate solutions to on-the-job

problems?). The new ideas were evaluated and discussed with staff so that they all had input and ownership of the new systems.

Once the new system was outlined, an implementation plan was developed. This reached into every part of the organisation. The impact of the plan had to be clarified, its implications in terms of competency and the need for additional training, learning and development was identified. A method of educating and enthusing the whole organisation about the plan was devised.

Before whole scale implementation, the new systems were trialled with small groups and the feedback used to improve the systems. After implementation, there was a constant process of review to ensure that the systems continued to evolve so that they remained good vehicles for encouraging innovation.