



**Australian Government**

# **BSBLDR802 Lead the strategic planning process for an organisation**

**Release: 1**

# BSBLDR802 Lead the strategic planning process for an organisation

## Modification History

| Release   | Comments                                                                             |
|-----------|--------------------------------------------------------------------------------------|
| Release 1 | This version first released with BSB Business Services Training Package Version 1.0. |

## Application

This unit describes the skills and knowledge required to lead the development of high-level strategic plans that serve the vision and mission of an organisation. It addresses analysing the environment, identifying risks and opportunities, planning staffing requirements, succession planning, and establishing and monitoring financial and non-financial performance indicators.

Leadership is applied in order to engage people with the organisation's vision and goals and in developing and implementing the plan.

It applies to senior managers and business owners who use cognitive and creative skills to review, critically analyse, consolidate and synthesise knowledge, in order to generate ideas and provide solutions to complex problems. They use communication skills to demonstrate their understanding of theoretical concepts and to transfer knowledge and ideas to others.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

## Unit Sector

Management and Leadership - Leadership

## Elements and Performance Criteria

| ELEMENT                                          | PERFORMANCE CRITERIA                                                                                                                                                                                                                                                                       |
|--------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>                                                                                                                                                                                     |
| 1. Initiate the strategic planning process       | 1.1 Consult organisation's decision makers to determine the parameters that will be used for the planning process, including timeframes and budget<br><br>1.2 Analyse current strategic planning documents to determine a methodology that is in keeping with the organisation's needs and |

| ELEMENT                                                                         | PERFORMANCE CRITERIA                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|---------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                                 | <p>past practice</p> <p>1.3 Identify stakeholders who will contribute to the plan's development</p> <p>1.4 Develop and document planning methodology within a project plan including resource allocation</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| 2. Conduct an environmental and organisational scan                             | <p>2.1 Research local and international best practice and trends in the organisation's field of operation</p> <p>2.2 Identify, collect and analyse demographic and trend data to provide profiling information about the organisation's market.</p> <p>2.3 Collect and analyse industry intelligence relating to competitors</p> <p>2.4 Identify key strengths, weaknesses, opportunities and threats (SWOT) to the organisation</p> <p>2.5 Identify major risk factors that could constrain the achievement of organisational goals in the short, medium and long term</p> <p>2.6 Consult stakeholders to identify issues and expectations affecting the organisation's operations</p> |
| 3. Lead the establishment of organisational key directions and goals            | <p>3.1 Engage staff and relevant stakeholders in establishing the major goals of the organisation</p> <p>3.2 Establish leadership to articulate the vision, mission and key goals of the organisation</p> <p>3.3 Provide leadership to establish the organisation's key result areas</p>                                                                                                                                                                                                                                                                                                                                                                                                |
| 4. Lead the development of the plan's key activities and performance indicators | <p>4.1 Initiate and manage processes and delegations to develop detailed activities to achieve the organisation's goals</p> <p>4.2 Develop specific performance indicators to enable the measurement of success</p> <p>4.3 Cost and budget for resourcing levels to enable the plan to be enacted</p> <p>4.4 Gain commitment to the process and the plan</p> <p>4.5 Engage relevant stakeholders and participants to sign off and commit to the finalised strategic plan</p>                                                                                                                                                                                                            |
| 5. Manage the implementation process                                            | <p>5.1 Develop tactical or operational annual plans to facilitate implementation of longer-term strategic plan</p> <p>5.2 Prioritise and resource (human, financial and capital) programs and operational tactics</p> <p>5.3 Analyse and plan for changes to processes or practices</p> <p>5.4 Plan human resource development and succession strategies to</p>                                                                                                                                                                                                                                                                                                                         |

| ELEMENT                          | PERFORMANCE CRITERIA                                                                                                                                                                                                                                                                                                          |
|----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                  | <p>ensure long-term business viability</p> <p>5.5 Initiate strategies to skill the workforce in order to implement the plan</p> <p>5.6 Establish communication processes to inform and support staff and stakeholders through implementation of the plan</p>                                                                  |
| 6. Manage the evaluation process | <p>6.1 Establish and implement processes to monitor performance against agreed benchmarks and performance</p> <p>6.2 Monitor outcomes of the strategic and operational plans</p> <p>6.3 Undertake review or refinement of activities in light of changing conditions to ensure the attainment of the strategic plan goals</p> |

## Foundation Skills

*This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.*

| Skill                      | Performance Criteria                        | Description                                                                                                                                                                                                                                           |
|----------------------------|---------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Reading                    | 1.2, 1.4, 2.1-2.5, 5.3, 6.2, 6.3            | <ul style="list-style-type: none"> <li>Sources, evaluates and critiques ideas and information from a range of complex texts to assist with strategic decisions</li> <li>Reviews texts to determine whether required outcomes have been met</li> </ul> |
| Writing                    | 1.4, 4.1, 4.2, 5.1, 5.3, 5.4, 6.1, 6.2, 6.3 | <ul style="list-style-type: none"> <li>Develops or reviews complex texts according to organisational requirements to convey strategy, context and intent</li> </ul>                                                                                   |
| Oral communication         | 1.1, 2.6                                    | <ul style="list-style-type: none"> <li>Leads discussions using active listening and questioning to seek the views and opinions of others</li> </ul>                                                                                                   |
| Numeracy                   | 1.4, 2.2, 4.3                               | <ul style="list-style-type: none"> <li>Develops budgets and plans using mathematical processes to calculate costs, timeframes and resources</li> </ul>                                                                                                |
| Navigate the world of work | 1.2, 3.2, 3.3, 5.1, 5.4, 5.5                | <ul style="list-style-type: none"> <li>Develops and implements strategies to ensure organisational goals are achieved</li> <li>Leads planning processes in accordance with organisational goals</li> </ul>                                            |
| Interact with others       | 1.1, 2.6, 3.1-3.3, 4.4, 4.5                 | <ul style="list-style-type: none"> <li>Demonstrates sophisticated control over oral, visual and/or written formats, drawing on a range of communication practices to achieve goals</li> </ul>                                                         |

|                   |                                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|-------------------|---------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                   |                                                               | <ul style="list-style-type: none"> <li>Plays a lead role in situations requiring effective collaboration, demonstrating high-level influencing skills, focusing and shaping awareness, and engaging and motivating others</li> </ul>                                                                                                                                                                                                                                         |
| Get the work done | 1.2, 1.3, 1.4, 3.1, 4.1, 4.2, 4.4, 4.4, 5.2-5.4, 5.6, 6.1-6.3 | <ul style="list-style-type: none"> <li>Systematically gathers and analyses all relevant information and evaluates options in order to inform strategic decisions or solve problems</li> <li>Develops flexible plans for complex, high impact activities with strategic implications that involve a diverse range of stakeholders with potentially competing demands</li> <li>Monitors results against stated goals, adjusting plans and resources where necessary</li> </ul> |

## Unit Mapping Information

| Code and title<br>current<br>version                                 | Code and title<br>previous<br>version | Comments | Equivalence<br>status |
|----------------------------------------------------------------------|---------------------------------------|----------|-----------------------|
| BSBLDR802<br>Lead the strategic planning process for an organisation | Not applicable                        | New unit | No equivalent unit    |

## Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

# Assessment Requirements for BSBLDR802 Lead the strategic planning process for an organisation

## Modification History

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## Performance Evidence

Evidence of the ability to:

- facilitate processes to develop an organisation-wide strategic plan including:
  - consulting with decision makers and other stakeholders
  - planning and budgeting for human, financial and capital resources and implementing staff development and succession plans
  - identifying and analysing information about the organisation and its environment including research about industry trends and practices, an environmental and organisational scan, existing organisational strategic planning documents, a strengths, weaknesses, opportunities and threats (SWOT) analysis and identifying risks to achieving the organisation's goals
  - aligning the strategic plan to the vision, mission and key goals of the organisation
  - identifying performance indicators
  - communicating with and engaging stakeholders in the development, sign off and implementation of the plan
- harness resources, staff and stakeholder commitment to ensure implementation of the strategic plan by consulting and engaging with them throughout the process
- implement and evaluate the strategic plan including developing tactical or operational annual plans and refining the plan to respond to changed conditions.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

## Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- outline contractual requirements and implications for the business
- explain financial management requirements and processes of the business
- describe industry trends and practices of relevance to the organisation's strategic direction

- specify organisational resource requirements to undertake projects
- describe processes and procedures for identifying strategic goals setting and activities
- describe risk management processes such as SWOT
- outline strategic and operational planning processes

## Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership field of work and include access to:

- organisational and industry information and data
- workplace documents including strategic planning documentation
- case studies and, where available, real situations
- interaction with others.

Assessors must satisfy NVR/AQTF assessor requirements.

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