



Australian Government

MARM5009A Establish a marine surveyor practice

Release 1

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Modification History

Release 1

This is the first release of this unit.

Unit Descriptor

This unit involves the skills and knowledge required to develop a business plan that includes a marketing, sales and promotional strategy to grow a small surveyor business. It includes researching and developing an integrated business plan for achieving business goals and objectives.

Application of the Unit

This unit applies to people working in the maritime industry as a marine surveyor.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.

Performance criteria describe the required performance needed to demonstrate achievement of the element. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

- | | |
|--|--|
| 1 Prepare to develop a business plan | <ul style="list-style-type: none">1.1 Essential components of a business plan are identified and reviewed for suitability for inclusion in overall plan for size and nature of proposed business1.2 Sources and costs of finance to be included financial plan are identified and required business liquidity and profitability is outlined1.3 Business resources and required legal and compliance requirements to be considered are identified and documented |
| 2 Develop a business plan | <ul style="list-style-type: none">2.1 Proposed business operation and overall business goals and objectives are identified and documented2.2 Operational requirements are identified to effectively produce/deliver products/services2.3 Specialist services and sources of advice are identified, where required, and costed according to resources available2.4 Vision statement is developed that reflects business objectives2.5 Target markets are identified through market research data2.6 Competitor analysis is obtained and market position the business is developed/reviewed |
| 3 Develop strategies for minimising risks | <ul style="list-style-type: none">3.1 Specific interests and objectives of relevant people are identified and their support for planned business direction is sought and confirmed3.2 Risk management strategies are identified and developed according to business goals and objectives, and relevant legal requirements3.3 Contingency plan is developed to address potential areas of non-conformance with plan |
| 4 Develop business promotion plans | <ul style="list-style-type: none">4.1 Business brand is developed4.2 Benefits of practice products/services are identified4.3 Promotional tools are selected and included in business plan and applicable legislation is incorporated as required |
| 5 Develop sales plans | <ul style="list-style-type: none">5.1 Plans to increase sales through yield per existing client are identified and developed for immediate or future inclusion in plan5.2 Plans and strategies to grow business and add new clients and sales are developed |

- 5.3 Proposed plans are ranked according to priority
- 5.4 Action plan to implement top ranked plan is developed and agreed with any relevant personnel
- 5.5 Business work practices are reviewed to ensure they support plans
- 6 **Implement and monitor promotional strategy**
 - 6.1 **Promotional package** is created to meet sales plan requirements, relevant legislative requirements and to enhance business corporate image
 - 6.2 Promotional strategy is implemented within budget in specified timeframes
 - 6.3 Criteria to measure effectiveness of sales/promotional strategy is established
 - 6.4 Adjustments to promotional strategy or service distribution are made as necessary to ensure required result is being obtained

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required Skills:

- Access and interpret relevant information
- Access and update records electronically
- Access web-based information services
- Assess business performance
- Determine and confirm information using questioning and active listening techniques
- Liaise with others and share information
- Make presentations
- Manage:
 - databases
 - projects
- Market products and services
- Negotiate effectively with clients and others
- Perform calculations related to achieving required outcomes
- Plan and sequence work
- Read and interpret documentation from a variety of sources
- Record and consolidate relevant related information
- Solve problems
- Use computer applications (word processing, spreadsheet, database, specific purpose computer systems) to assist in achieving required outcomes
- Use language and concepts appropriate to cultural differences
- Use statistical/data analysis and interpretation
- Work independently and unsupervised

Required Knowledge:

- Business/organisational policy and procedure development and implementation
- Commonwealth, state/territory and local government legislative requirements relating to business operations, especially in regard to:
 - anti-discrimination
 - due diligence
 - equal employment opportunity
 - governance requirements
 - industrial relations
 - work health and safety (WHS)/occupational health and safety (OHS) and environmental issues

- How to acquire and interpret relevant data
- Industry:
 - compliance requirements
 - market position relative to type of survey and business operations
- Information technology and communications systems
- Marketing and promotional principles
- Methods of evaluating current industry/organisation product and marketing mix
- Planning processes
- Preparation of a business plan
- Principles of risk management relevant to business planning
- Relevant:
 - common law, legal systems and procedures
 - industry codes of practice
- Reasons for and benefits of, business planning
- Setting goals and objectives
- Types of business planning:
 - feasibility studies
 - strategic, operational, financial and marketing planning
- WHS/OHS requirements and safe work practices

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, the required skills and knowledge, the range statement and the Assessment Guidelines for the Training Package.

Critical aspects for assessment and evidence required to demonstrate competency in this unit

The evidence required to demonstrate competence in this unit must be relevant to and satisfy all of the requirements of the Elements, Performance Criteria, Required Skills, Required Knowledge and include:

- developing effective planning documents
- communicating effectively with others as required
- attention to detail when completing documentation
- ensuring behaviour reflects relevant current legislative and regulatory requirements.

Context of and specific resources for assessment

Performance is demonstrated consistently over time and in a suitable range of contexts.

Resources for assessment include access to:

- industry-approved marine operations site where establishing a marine surveyor practice can be conducted
- tools, equipment and personal protective equipment currently used in industry
- relevant regulatory and equipment documentation that impacts on work activities
- range of relevant exercises, case studies and/or other simulated practical and knowledge assessments
- appropriate range of relevant operational situations in the workplace.

In both real and simulated environments, access is required to:

- relevant and appropriate materials and equipment
- applicable documentation including workplace procedures, regulations, codes of practice and operation manuals.

Method of assessment

Practical assessment must occur in an:

- appropriately simulated workplace environment and/or
- appropriate range of situations in the workplace.

A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate to this unit:

- direct observation of the candidate establishing a marine surveyor practice
- direct observation of the candidate applying relevant WHS/OHS requirements and work practices.

Guidance information for assessment

Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

In all cases where practical assessment is used it should be combined with targeted questioning to assess Required Knowledge.

Assessment processes and techniques must be appropriate to the language and literacy requirements of the work being performed and the capacity of the candidate.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below.

- | | |
|-----------------------------|---|
| Business plan may include: | <ul style="list-style-type: none">• Business opportunities, which may be influenced by:<ul style="list-style-type: none">• amount and types of finance available• expected financial viability• skills of operator• Details of ownership/management• Finance, expenditure statement, balance sheet and cash flow forecast, projections for the initial years of operation assumptions underlying business plan, expected level of inflation and taxation, expected trend of interest rate, capital expenditure and its timing, stock turnover, debtor collection period, creditor payment period, return on investment• Level of risk involved, risk assessment and management• Market focus of business• Marketing requirements• Need to raise finance and requirements of lenders• Organisation/operational arrangements• Proposed size and scale of business• Recognition of any seasonal or cyclical (time-based) elements, which are crucial to business success• Resources required and available• Sources of funding• Specialist services and sources of advice that may be required• Staffing• Stages in business development |
| Financial plan may include: | <ul style="list-style-type: none">• Analysis of sales by product/service, identifying where they were sold and to whom• Cash flow estimates for each forward period• Current financial state of enterprise (or owner/operator)• Estimates of profit and loss projections for each forward period• Financial performance to date (if applicable)• Likely return on investment• Monthly, quarterly or annual returns• Non-recurrent asset calculations• Profit, turnover, capital and equity targets• Projected profit targets, pricing strategies, margins• Projections of likely financial results (budgeting)• Projections, which may vary depending on importance of such information and stage in life of business• Resources required to implement proposed marketing and production |

- strategies (staff, materials, plant and equipment)
- Review of financial inputs required (sources and forms of finance)
- Risks and measures to manage or minimise risks
- Working, fixed, debt and equity capital
- Business goals and objectives may include:
 - Achievable, measurable, realistic, time defined
 - Customer needs
 - Family benefits
 - Goal and objective plans, systems and processes
 - Lifestyle issues
 - Market focus of business
 - Short, medium, or long-term goals
 - Social responsibility
- Market research data may include:
 - Australian Bureau of Statistics (ABS)
 - Chambers of commerce information
 - Client surveys
 - Data about:
 - existing clients
 - possible new clients
 - Data from external sources such as other like businesses, industry associations and regulators
 - Industry reports
 - Internet
 - Libraries
 - Personal interviews
 - Primary market research
 - Secondary market research (available research by other people)
 - Small business surveys
 - Telephone surveys
 - Trade associations/journals
- Competitor analysis may include:
 - Competitor:
 - offerings
 - profile in market place
 - promotion strategies and activities
- Market position may include:
 - Data on:
 - augmented product (total package of features/benefits)
 - communication
 - core product and or the goods or services provided
 - cost components
 - distribution strategies
 - market position
 - marketing channels

- new/changed products
 - place
 - price
 - pricing objectives (profit, market penetration)
 - pricing strategies (cost plus, supply/demand, ability to pay)
 - product services or mix of services
 - product/services differentiation from competitors
 - promotion
 - promotion budget
 - promotional strategies
 - tangible product (what is perceived)
 - target audience
- Business brand may include:
- Attention, interest, desire, action (AIDA)
 - Business image
 - Practice/business logo/letterhead/signage
 - Facility decor
 - Phone answering protocol
 - Slogans
 - Style guide
 - Templates for communication/invoicing
 - Writing style
- Benefits may include:
- Benefits as perceived by client
 - Features as perceived by client
- Promotional tools may include:
- Advertising
 - Brochures
 - Direct mail
 - Networking and referrals
 - Newsletters (print and/or electronic)
 - Press releases
 - Publicity and sponsorship
 - Seminars
 - Telemarketing/cold calling
 - Websites
- Applicable legislation may include:
- Consumer protection
 - Corporate governance
 - Marine insurance
 - Marine Safety (Domestic Commercial Vessel) National Law
 - National Standard for Commercial Vessels (NSCV)
 - Trade practices
 - WHS/OHS

- Yield per existing client may include:
- Packaging fees
 - Raising charge out rates/fees
 - Reducing discounts
 - Selling more services to existing clients
- Promotional package may include:
- Directing to existing or new clients
 - Client newsletters or bulletins
 - Media advertising (radio, television, newspapers, trade journals, direct marketing)
 - Product service brochures
 - Products or give-a-ways and third party services
 - Sponsorship

Unit Sector(s)

Not applicable.

Competency Field

Marine Surveying