

BSBMGT616 Develop and implement strategic plans

Assessment Task 1 – Case Study/Written Report (Organisational review)

About the assessment

This assessment is about writing a report that includes summary notes from the meeting with your key stakeholder/strategic planning consultant based on a case study related to the unit BSBMGT616 Develop and implement strategic plans and its elements and performance criteria.

Performance objective

In this assessment, you are required to manage the review process of an organisation, describe changes to the organisation's mission and vision statements, and communicate the review process to stakeholders (through an electronic medium such as email).

Assessment description

Review the organisation's vision and values by reviewing the case study information provided, as well as meeting with a key stakeholder in the case study organisation (your assessor). After reviewing materials, revise the vision and mission statements to reflect the current status and direction of the organisation, then email the relevant stakeholders to:

- outline changes to the vision and organisational values
- describe the strategic planning process and identify where input can be provided.

Assessment Instructions

Procedure to follow

For the case study information provided in this assessment, you need to summarise:

- the established (written) vision and mission of the organisation
- current practices of the organisation and, in particular, whether they support the mission objectives of the organisation, or point to potentially new objectives for the organisation.

After you have developed this summary, you need to meet with a key stakeholder/strategic planning consultant (your assessor) to discuss the vision and mission as you have identified it. You should also check that they agree with your findings. Summarise, in dot-point form, your discussions with the key stakeholder/consultant and ensure that this includes any recommendations they made.

After this meeting, you need to draft an email to the other stakeholders in your organisation, using the headings described below:

1. **Existing vision and mission:** From the case study information provided, describe the existing mission and vision statements.
2. **Current approaches:** From the case study information provided, and your meeting with the key stakeholder/consultant, describe the current organisational understanding and enactment of the mission and vision statements.
3. **Revised vision and mission:** Based on steps 1 and 2 above, develop revised vision and mission statements that reflect the current organisational requirements.
4. **Organisational values:** Based on the case study information provided, step 2 above, and reflecting on the revised mission/vision statements (from step 3), describe the organisational values required to support the revised mission and vision statements.
5. Develop a draft of an email and submit it to the key stakeholder/consultant for review. When submitting the proposed email and accompanying documents, you need to ensure that:
6. Your email is titled 'Mission/Vision review'.
 - a. Your report is in order, with attachments (notes from your meeting) at the back of your report.
 - b. Your report is submitted as required by your organisation (your training provider).

The Assessment Task is due on the date specified by your assessor. Any variations to this arrangement must be approved in writing by your assessor. Submit this document with any required evidence attached. See specifications below for details.

Specifications to submit (details of items for submission)

You will be assessed against performance objectives mentioned in this assessment task. Before you submit your work to Assessor, check to include the following-

You must provide:

1. A completed draft email, as outlined above in steps 1–4, using the headings provided for each step.
2. Report that includes summary notes from the meeting with your key stakeholder/strategic planning consultant.

Your assessor will be looking for:

- Evidence that you have analysed and identified the needs of the case study, and reflected these in the revised mission and vision statements you have developed.

Case study

You have been the General Manager of MacVille's successful import/export business centre in Sydney for the past two years. You have been asked by the Board to assist in the development of a strategic plan by initially conducting a review of the vision, mission and values of the organisation.

You review the annual report for the previous year, and note the following statement by the Chair of the Board:

'Within the next five years, MacVille will become a national brand, and will be accepted as an integral part of the hospitality industry, perceived as a key component in the success of hospitality establishments, both large and small.'

'MacVille is in business to provide espresso coffee machines that meet the efficiency, reliability and sustainability needs of our hospitality clients who, in turn, reward us with profits that will allow our stakeholders and the communities in which we operate to prosper.'

Being part of the management that assisted in upholding the values of the organisation, you have been made very aware of the Chair and Board's views on the following values and, after reviewing your papers and reports, you speak with the CEO, who replies:

'MacVille's values have been the same for as long as the organisation has existed. For our stakeholders, it has always been about stewardship and to adhere to professional and moral standards of conduct in all that we do. For our people, we are committed to encouraging self-directed teams, we cultivate leadership and maintain high levels of safety. Externally, we are committed to wise environmental practices and offering meaningful value to our customers.'

Later in the review process, you were presented with an opportunity to discuss the application of the vision, mission and values with the CEO again. This time, you were more interested in researching what had changed since the last strategic vision was formulated.

The CEO explained:

'In the past few years, since the last strategic plan was formulated, there has been developments in new areas that were not clearly recognised when developing the last plan. These changes are becoming an important part of our operations on a daily basis, and should be reflected in our vision, mission and values.'

The CEO further explained:

'There is a real need to incorporate innovation into our mission because it has been an outcome from the self-directed team's directive. Finding new ways to improve the efficiency of processes and effectiveness of customer solutions has become a priority. There has always been a need to evaluate what we were doing, to continually challenge our methods

and ask how we can simplify and improve our business. We should never rest on our laurels but instead constantly innovate and raise our standards, because we are not afraid to try new ideas and concepts. The organisation needs to embrace strategic alliances and to seek out new partnerships that support and promote our mission, desired outcomes, and strategies.'

When prompted for further changes that had taken place, the CEO stated:

'MacVile needs to identify more closely with the community it serves. We need to be a good corporate citizen that recognises our responsibility to be active participants in our local communities, and even donate a % of profits every year to a wide variety of community and non-profit organisations.'