

BSBMGT616 Develop and implement strategic plans

Assessment Task 3 – Report (Strategic Planning)

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 develop and document a strategic plan for the organisation based on the research you have conducted. You will also need to communicate the strategic plan to key stakeholders in the organisation.

Assessment description

Write a strategic plan, including consideration of resource implications, and then circulate to stakeholders. After endorsement from the Board, communicate the plan to employees and describe any implications for their role in the organisation.

Assessment Instructions

Procedure to follow

For the provided case study information, following on from your analysis of the organisation, and competitors and allies, you need to:

1. Formulate strategic objectives for the organisation (based on the Board minutes).
2. For each objective, develop and describe strategies that you think could be used to meet the objective in the future.
3. For the strategies described, you need to:
 - a. develop a prioritised list of strategies
 - b. describe a timeframe for each to be completed
 - c. assign responsible parties to each strategy
 - d. assign measurable performance indicators to individual strategies.

When you have completed your draft strategic plan, you need to make an appointment to meet with the CEO of your organisation (your assessor) to discuss your plan. They will gain endorsement from the Board for the plan, and return it to you with any required amendments.

After you have received the endorsed plan from the Board, you need to:

1. Develop briefing materials (dot-point descriptors) for the identified responsible parties, outlining the requirements of their role in achieving the relevant strategy.
2. Develop a cover statement/letter to be sent out with the strategic plan that includes:
 - a. a brief overview of key objectives
 - b. a description of the research and process used to develop the plan.

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 strategic plan, with organisational objectives, and strategies for enacting and achieving the objectives [Steps 1-3].
2. Summary notes from your meeting with the organisation's CEO (your assessor).
3. Briefing and information materials about the revised strategic plan for staff and responsible parties [Steps 4-5].

Your assessor will be looking for:

- Evidence that you have analysed and identified the needs of the case study, and reflected these in the strategic plan and informational materials you have developed.
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Case study

You are provided with the minutes of the board meeting, where the CEO spoke about the strategic objectives that will form part of the strategic plan.

MacVile Board Meeting Minutes: July, 8 201X

6:00pm Board Room, Brisbane

Board members:

Present: Alan Jones (Chair), Jenny Ng, Olga Hartwick (Secretary), John Brennen, James Laird, George Saldais.

Absent:

Quorum present? Yes.

Others present:

CEO: Patricia Mees.

Proceedings:

Meeting called to order at 7.00 pm by Chair, Alan Jones, who explained that this was a special meeting of the Board to hear the presentation of the strategic plan by the CEO Patricia Mees.

(Last month's) meeting minutes were amended and approved.

Overview of the strategic plan: Patricia Mees

1. Patricia Mees gave a presentation concerning the objectives that would form part of the strategic plan for the next five years.
2. Objective 1 – To sell and service MacVile espresso coffee machines in every state of Australia. This was a top priority that would involve the acceptance of Java Estates tender. This was an important alliance and one that should be managed at the highest level. With the Sydney warehouse now established, it was important to look for other warehouse opportunities in high volume states. The other states could be managed with an agent's network and by outsourcing the maintenance.
3. Objective 2 – To increase profit margins by 5% from our 2010 benchmark in the next five years. This should occur naturally, with increased sales allowing for better price negotiations with suppliers, and getting all departments to make optimum use of their staff.
4. Objective 3 – To establish the MacVile brand recognition in key markets in the next five years, mostly via new technologies but also co-branding with our strategic partner. This is also a high priority if the successful rollout is to be achieved.
5. Objective 4 – To reduce our waste and energy use by 10% from our 2010 benchmark within the next five years. Education programs and incentive rewards for innovations in this area should see the organisation achieve its objectives.

Meeting adjourned at 9.30 pm. Minutes submitted by Secretary, Olga Hartwick.