BSBLDR601

**Lead and manage organisational change**

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| **Assessment Task 2 – Performance and Skills** |
| **Task summary**  Part A requires you, in the role of Operations Manager, to prepare a briefing report to assist in guiding change at Samson Media. You will be required to:   * Develop a Change Management Plan * Develop a Communication and Education Plan * Write a brief for the human resources department to guide human resources personnel regarding organising change management team building training * Develop a staff communication to promote the benefits of the upcoming training, to assist in to overcoming resistance to change.   Part B requires you to review information about changes implemented, and to evaluate the change management process.  **Required**   * Access to textbooks/other learning materials. * Access to a computer and Microsoft Office. * Access to the internet.   **Note**- If you do not have access to Microsoft Office, you must save your work as PDF before uploading.  **Timing**  The due date of this assessment is available on your learning management system.  **Submit**   * This completed workbook   **Assessment criteria**   * All questions must be answered correctly for you to be assessed as having completed the task satisfactorily.   **Re-submission opportunities**   * You will receive feedback on your performance from your Assessor. The feedback will indicate if you have satisfactorily addressed the requirements of each part of this task. * If any part of the task is not satisfactorily completed, your assessor will provide you with written feedback to guide you on what you must undertake to demonstrate satisfactory performance. This assessment may be re-attempted twice. Your resubmission must be uploaded within three (3) days of receiving your grade of “not yet satisfactory”. You must clearly display “Resubmission” on your resubmitted work. * You have the right to appeal the outcome of assessment decisions if you feel that you have been dealt with unfairly or have other appropriate grounds for an appeal.   You are encouraged to consult with your assessor prior to attempting this task if you do not understand any part of this task or if you have any learning issues or needs that may hinder you when attempting any part of the assessment.  **Re-submission opportunities**  You will be provided feedback on your performance by the Assessor. The feedback will indicate if you have satisfactorily addressed the requirements of each part of this task.  If any parts of the task are not satisfactorily completed, the assessor will explain why, and provide you written feedback along with guidance on what you must undertake to demonstrate satisfactory performance. Re-assessment attempt(s) will be arranged at a later time and date.  You have the right to appeal the outcome of assessment decisions if you feel that you have been dealt with unfairly or have other appropriate grounds for an appeal.  You are encouraged to consult with the assessor prior to attempting this task if you do not understand any part of this task or if you have any learning issues or needs that may hinder you when attempting any part of the assessment. |

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| **Assessment Cover Sheet** | |
| Student name: |  |
| Student ID |  |
| Trainer’s Name: |  |
| Date Submitted: |  |
| Student declaration: | I declare that:   * I have read and understood all the information provided in relation to the assessment requirements to complete this unit, the instructions and the purpose and processes of undertaking this assessment task * This assessment is my own work and where other’s works or ideas have been used, I have appropriately referenced or acknowledged them * I understand that plagiarism is a serious offence that may lead to disciplinary action. |
| Student signature: |  |

 **Assessment Task 2 – Performance and Skills**

**Case study:**

Samson Media is a publisher of several upmarket fashion magazines. It has strong links with several high-profile fashion houses whose products are featured in the magazines and provide a significant source of advertising revenue. Readers of the magazines are predominantly 35 – 54-year-old women.

Readership has fallen over the last two years. This is due in the most part to due to competition from a range of other fashion magazines and consumers switching to digital media. Due to the decline in readership, profits have also fallen by 20% and there has also been a decrease in the share price.

Therefore, the new CEO, Amir Johnson, has been appointed. Amir was the former Marketing Director for a well-known successful media business that included a national newspaper, magazines, and a subscription television channel. Those publications are focused mainly on sport and celebrity gossip. It can undercut its competitors with low prices, enabled by a ruthless approach to achieving high levels of efficiency.

Amir and his team of Managers have developed a Strategic Plan that includes the following objectives.

* Increase return on capital to 8% within 2 years.
* Enact a transformational change of the company that will convert all magazines to a digital format.
* Close the printing and distribution site.
* Achieve cost efficiencies through relocating the head office to a smaller office.
* Restructure head office staff through moving to a smaller core of permanent staff and more contract staff.

It is intended that the new digital magazines will have the following features:

* Focus on health and beauty, fashion, and celebrity gossip.
* Some free content but full access available only on a subscription basis.
* Additional features available to subscribers such as video clips, podcasts, and discussion

Current staff information is as follows. All staff are full-time permanent staff and their total salary costs per annum to Samson Media are also included below.

* General Manager: $200,000
* Finance Manager: $150,000
* Marketing Manager: $150,000
* Customer service manager: $100,000
* Customer service assistant: $240,000 (total salary costs for each journalist is $80,000) (2) - $100,000 (total salary costs for each assistance is $50,000)
* Online Marketing Coordinator: $120,000
* Human Resources Manager: $110,000
* Editor: $85,000
* Art Editor: $80,000
* Journalists (3): $270,000 (total salary costs for each journalist is $90,000)
* Graphic designers (2): $240,000 (total salary costs for each journalist is $80,000)
* Editing Assistant (2): $120,000 (total salary costs for each assistance is $60,000)
* Photographer (2): $150,000 (total salary costs for each assistance is $75,000)
* Senior Designer (2): $260,000 (total salary costs for each journalist is $120,000)
* Senior Production Controller: $95,000
* Printing and distribution (20 staff): Total $1,000, 000

The cost of running the printing and distribution site, plus staff costs is currently approximately $1,500,000 per annum. It has been identified that, given the change to the new medium of publication, it will be an immediate priority to shut down the site and make all the staff redundant.

The current office rent is $500,000 per annum.

Employment contracts are in place for all staff members employed in Head Office. Printing and distribution workers are employed under an award. The CEO has indicated that he is interested in moving towards an enterprise agreement arrangement for all remaining staff and would like to have this reviewed as part of the change management process.

Current human resources policies and procedure include a recruitment, selection and induction policy and procedure and a termination policy and procedure. There is an ad-hoc performance review process in place which occurs as issues arise. There are no formal processes for training needs analysis or professional development.

As the General Manager, you have been asked to lead the development and implementation of the change management plan, with the first step being to consult with an organisational change expert to discuss issues and strategies for change management for the company.

It is anticipated that, while there will be some cost savings in making the change, there will also be costs involved including:

* Redundancies: anticipated cost is $300,000
* Upskilling staff: $100,000
* Consulting with experts: $100,000
* Communication throughout change with key stakeholders: $100,000

**Part A – Develop and implement change management strategy**

1. Research best practice change management strategies

Thoroughly review the case study information provided above. Analyse the company’s organisational objectives and consider the strategic changes that will need to occur based on strategic objectives.

Review Samson Media’s current human resources policy and procedures, their strategic objectives, and the need for change. In the light of the changes required to the organisation, consider changes that may need to be made to the human resources policies and procedures. Make notes for use in your briefing report.

Using the Internet, research change management, issues, and practices, including barriers that can impact on change, and best practice change management strategies. Make notes for inclusion in your briefing report and to assist you in identifying best practice change management strategies for Samson Media.

You will also need to identify the sources of the information you access for your briefing report to show that you have identified expert guidance on change management. So, make notes on all the sources of information you identify and use. You should identify at least three sources of information that could be expert sources.

Monitor Samson Media’s external environment by researching and analysing trends in magazine publishing and online magazine readership, and their impact on Samson Media’s organisational objectives as set out in the scenario information. This should also include a PESTLE analysis, reviewing political, economic, social, technology, legal and environmental factors. Make notes on the sources of information and your general findings for inclusion in your briefing report.

Consider major operational change requirements and recommended order of priority based on your review of the scenario information and human resources policy and procedures. Make notes for use in your report.

1. Develop change management briefing report

The purpose of the change management report is to identify change requirements and opportunities and to inform the development of the change management plan.

The report will also include a section on risk management to ensure that the company is ready for all contingencies. (*Use the Briefing Report* ***Appendix A*** *to guide your work).*

Your briefing report must address:

* An overview of the current situation facing Samson Industries including:
* Analysis of the company’s organisational objectives and identification of strategic changes needs.
* A review of the current human resources policies and procedures and practices at Samson Media against strategic objectives and report on required changes.
  + An analysis of the external environment relevant to Samson Media and its objectives, including events/trends that impact on strategic objectives, including trends in magazine publishing, as well as trends in on-line magazine readership. Your analysis should reflect a PESTLE analysis approach, reviewing political, economic, social, technology, legal and environmental factors.
  + An outline of the major operational change requirements for Samson Media based on your analysis and review, as well as recommended priorities for change.
  + Sources of information you identified about best practice change management strategies, as well as an overview of best practice change management strategies. Summarise each source of information and briefly outline how it has assisted in identifying major change requirements and opportunities.
  + A cost-benefit analysis of the high priority change requirements and opportunities. Research and document any costs for the change requirements you are recommending.
  + Recommended communication and education strategies to inform all stakeholders of the change, as well as promote the benefits of the change.
  + Risk analysis of the potential risks/barriers to change for Samson Media and strategies to overcome risks and barriers to change. In identifying risks and barriers to change and solutions to address these, you must demonstrate high-level problem-solving skills to identify all possible risks, as well as innovative approaches to risk mitigation.

1. Write a Change Management Plan

Your plan should set out all aspects of the recommended changes, and include the following:

* An introduction: project background, links to the company’s strategic goals and other changes that are occurring in the company
* The project sponsor
* The project’s objectives
* What the change process will achieve
* Principles that underpin the change plan
* Ethical issues that need to be considered
* Main elements of the Change Plan
* Change drivers, constraints, and risks
* Key shareholder analysis
* The company’s readiness to change
* Key change messages
* Change elements
* A change plan
* Project reporting arrangements
* How the changes will be consolidated
* How the changes will be evaluated

*(Use the Change Management Plan* ***Appendix B*** *to guide your work).*

1. Write a Communication and Education Plan

Develop a communication and education plan to be used in conjunction with the change management project plan. This plan should show how the change will be managed, including the provision of information to staff about the proposed changes and benefits.

Ensure that the strategies you develop are designed to promote the benefits of change to staff and to reduce the likelihood of a negative response/adverse outcomes. Your communication and education plan should also show the reporting process to senior management, which will be required on a regular basis.

*(Use the Communication and Education Plan* ***Appendix C*** *to guide your work).*

1. Send an email to the CEO and Senior Management

Assume you need to gain input from and approval of the CEO and Senior Management.

Send an email that introduces and summarise the contents of the draft change management plan and your draft communication and education plan and ask for their input and approval for the to move forward with the project.

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1. Assume that the change management plan that was adopted by Samson Media includes training and development for staff in several areas. One of these training areas is change management team building, which is especially important during the change management process. The training is to be delivered over an eight-week period for approximately 2 hours a week. You have also identified that experts such as motivational speakers could also be hired for this.

You have also been given the task, in the role of Operations Manager, to send a brief to the human resources department. This brief will be used to guide human resources personnel regarding organising the change management team building training and to give your ideas about the content that should be included in the training.

Assume that, as you also believe there may be resistance to the training due to a general resistance to the changes, that you also develop a staff communication to promote the benefits of the upcoming training and assessment to assist in overcoming resistance to change.

1. **Develop a human resource brief**

Using your research develop a short one-page brief to send to the human resources department outlining the requirement to conduct the training as part of the change management process and the timing of the training. Your brief should include, as a minimum, the following:

* The benefits of change management team building
* Ideas for the content of the training that will take place
* Experts who could assist in providing training
* Ideas for team building exercises. Provide at least two exercises
* How best to promote the training to staff
* Timing

*(Your brief should be no more than one page. Use the Human Resources Brief* ***Appendix D*** *to guide your work).*

1. **Send an email to all staff**

To inform your staff email, consider how you could best promote the training to staff to overcome resistance to change. Review change management literature to inform your response. Outlining the rationale for the training, as well as the benefits of the training. Use the ideas that you have researched to overcome resistance to change. Briefly outline some of the proposed ideas for the training.

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**Part B – Evaluate change management strategy**

Assume that the following change management objectives are included as part of the change management process for Samson Media:

* Employees satisfied with information provided as part of the change management process.
* Communication occurred through multiple channels.

Assume that the following communication activities were implemented:

* Weekly staff meeting
* Newsletter updates through staff email

Assume it is 1 month into the change process and a Staff Survey of the remaining staff has been conducted.

1. Write a change management review

Review of the change management objectives, communication activities implemented, and the Staff Survey Results. Evaluate the effectiveness of the change management process and provide recommendations for improving communication activities.

*(Your review should be between half a page and one-page long. Use the Change Management Review* ***Appendix E*** *to guide your work).*

2. Develop a slideshow presentation as a briefing to the CEO of the organisation of the *Change Management Review*.

Your change management brief and presentation should include the following:

* What the change management objectives are
* What change management communication activities took place
* Recommended changes to the change management plan and the communication and education plans.
* It should also recommend updates to the change management plan through relevant communication activities.

3. Conduct a role play of your presentation briefing to the CEO seeking their approval and sign –off.

**NOTE:**

Your trainer or a fellow student should take on the role of CEO. The role play will need to show you answering questions asked by the CEO as well as you responding to their feedback.

If you are completing this unit online you can choose a friend, family member, other student, or work colleague to play the role of the CEO with them questioning the information presented and providing you with feedback. (You MUST video record and upload into Canvas the role play showing communication between yourself and the CEO.)

**Appendix A**

**Samson Media - Change Management Briefing Report**

**Introduction**

Provide an overview of the current situation facing Samson Industries including:

1. Analysis of the company’s organizational objectives and identification of strategic changes needs.
2. A review of the current human resources policies and procedures and practices at Samson Media against strategic objectives and report on required changes.

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**External environment analysis**

Provide an analysis of the external environment relevant to Samson Media and its objectives, including events/trends that impact on strategic objectives, including trends in magazine publishing, as well as trends in on-line magazine readership.

Your analysis should reflect a PESTLE analysis approach, reviewing political, economic, social, technology, legal and environmental factors.

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**Sources of information on change management and best practice approaches**

Outline the sources of information you identified about best practice change management strategies, as well as an overview of best practice change management strategies.

Summarise each source of information and briefly outline how it has assisted in identifying major change requirements and opportunities.

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**Major change requirements**

Identify and document major operational change requirements based on the scenario information and your research and analysis to date.

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**Prioritisation of change requirements**

Outline your recommended priorities for each of the change requirements, including your reasoning/.

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**Cost-benefit analysis**

Provide cost-benefit analysis of the high priority change requirements and opportunities. Use the information in the scenario to inform your analysis. You may also need to research costs for the change requirements you are recommending.

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**Recommended communication and education strategies**

Outline your recommended communication and education strategies to promote the benefits of the change

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**Risk Assessment**

Complete the risk assessment template provided to you to record risks and solutions

Identify potential risks and barriers to change and strategies to address these using the risk assessment template. Demonstrate your problem-solving skills, as well as innovation skills to identify risks/barriers to change, as well as to identify relevant and innovative strategies to deal with risks/barriers to change.

Complete the risk assessment table below to you to record risks and solutions.

**Risks and barriers to change and strategies to overcome these**

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| **Risk description** | **Likelihood** | **Impact** | **Priority** | **Preventative Action/Contingency Plan** |
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**Congratulations on completing your Assessment Task 2. Please remember to submit:**

* This completed workbook
* Your slideshow presentation briefing to the CEO
* Recording of your slideshow presentation to the CEO (if Observation Checklist of Role Play is not completed by trainer/assessor)

**Appendix B**

**Samson Media - Change Management Plan**

**Introduction**

Provide background, link to strategic goals and other changes

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**Project Sponsor**

This person leads the change project and is accountable for ensuring the project and change plan are implemented

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**Project Objectives**

Detail what the project will achieve.

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**Change Objectives and Principles**

Provide details of:

* What the change process will achieve
* Principles that underpin the change plan
* Ethical issues that need to be considered and how will the change plan will address them.

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**Change Plan Elements**

What are the main elements in the change plan? [e.g., people/culture, systems/technology, documentation, positions/roles, process, skills] Each of these elements may require a particular focus in the change plan.

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**Rationale for the Change**

* List the drivers and constraints for change.
* What are the risks for the change process?

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**Key Stakeholder Analysis**

Identify the key stakeholders and:

* Analyse their response to the change [e.g., what will be their main concerns/fear, where is there likely to be support for the change];
* Identify their needs in terms of change management and consider the style of communication required [language style & level]; and
* Identify the preferred media for communicating or consulting with them about the change [e.g., sessions involving dialogue about the changes, newsletters, briefings from project team members, frequently asked questions].

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**Assessment of Readiness to Change**

* Comment on the status of the change so far [e.g., is there a high-level strategy in place that stakeholders are already aware of and committed to that provides a framework for the change].
* What elements might support the change [e.g., dissatisfaction with current processes; a workplace culture that supports change and innovation].
* Is there strong senior support for the change?

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**Key Change Messages**

Identify 6 key messages to convey about the change process, being upfront about gains and losses. Consider:

* What will be gained/lost for the key stakeholder groups in the change process;
* The messages from the stakeholder perspective;
* What will be their main concerns; and
* Presenting changes in a positive light even whilst acknowledging loss.

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**Identify Change Elements**

* Structures/Processes/Responsiblities/Resources/Timeframes/Performance Measures
* Consider the need for change support structures [e.g., a change team, super users/specialists who are trained first and can support people in the workplace, involvement of users and key stakeholders at various stages, change champions in the workplace].
* Consider if there is a need for transitional arrangements to support and whether the introduction of the change process needs to be staged.
* What will be the impact on workloads and how will these be managed?

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**Develop Change Plan**

* Develop a change plan including performance measures [how will you know the change plan is effective?]. Ensure the plan is adequately resourced.

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| **Actions** | **Resource requirements** | **Who** | **When** | **Performance Measures** |
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**Reporting arrangements**

* Identify and explain the reporting arrangements for the project.

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**Consolidation**

* Ensure policies, procedures and performance measures reinforce the changes.
* Remove organisational barriers to the change.
* Reinforce how changes have provided benefits.

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**Evaluation**

* How will the change be evaluated in relation to the achievement of the planned objectives?
* How will the change management processes be evaluated – consider summative as well as final evaluations, how can you assess your change management strategies as you implement them?
* How will the evaluation outcomes be circulated and promoted to stakeholders?
* How will evaluation outcomes be used in other organisational processes?

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**Appendix C**

**Samson Media - Communication and Education Plan**

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| **Audience** | **Key message** | **Delivery method** | **Frequency and duration of session (if applicable)** | **Location** |
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**Appendix D**

**Samson Media - Human Resources Brief**

**Benefits of change management team building**

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**Ideas for content of training**

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**Experts who could assist in providing training**

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**Ideas for team building exercises**

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**How best to promote the training to staff**

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**Timing**

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**Appendix E**

**Samson Media - Change Management Review**

**Objectives**

Change management objectives for Samson Media include:

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**Activities conducted**

Describe the range of communication activities associated with the change process that were conducted:

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**Recommendations**

Recommendations arising from the analysis are to update the change management plan and the communication and education plan are as follows:

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