

UNIT B1 DEVELOP AND IMPLEMENT OPERATIONAL PLANS FOR YOUR AREA OF RESPONSIBILITY

UNIT SUMMARY

What is the unit about?

Every organisation should have an overall strategic business plan and each identified area of responsibility should also have an operational plan that will contribute to achieving the objectives set out in the strategic business plan.

The 'area of responsibility' may be, for example, a branch or department or functional area or an operating site within an organisation.

Who is the unit for?

The unit is recommended for middle managers.

Links to other units

This unit is linked to **units B6. Provide leadership in your area of responsibility and E2. Manage finance for your area of responsibility** in the overall suite of National Occupational Standards for management and leadership.

Skills

Listed below are the main generic 'skills' which need to be applied in developing and implementing operational plans for your area of responsibility. These skills are explicit/implicit in the detailed content of the unit and are listed here as additional information.

- Planning
- Risk management
- Delegating
- Networking
- Involving others
- Innovating
- Consulting
- Communicating
- Influencing and persuading
- Monitoring
- Evaluating
- Setting objectives
- Building consensus

UNIT B1 DEVELOP AND IMPLEMENT OPERATIONAL PLANS FOR YOUR AREA OF RESPONSIBILITY

Outcomes of effective performance

You must be able to do the following:

- 1 Balance new ideas with tried and tested solutions.
- 2 Balance risk with desired outcomes.
- 3 Make sure your plans are consistent with the objectives of your area of responsibility.
- 4 Make sure your plan is flexible and complements related areas of work.
- 5 Develop and assign objectives to people together with the associated resources.
- 6 Win the support of key colleagues and other stakeholders.
- 7 Monitor and control your plan so that it achieves its overall objectives.
- 8 Evaluate the implementation of your plan and make recommendations that identify good practice and areas for improvement.

UNIT B1 DEVELOP AND IMPLEMENT OPERATIONAL PLANS FOR YOUR AREA OF RESPONSIBILITY

Behaviours which underpin effective performance

- a You constantly seek to improve performance.
- b You work towards a clearly defined vision of the future.
- c You present information clearly, concisely, accurately and in ways that promote understanding.
- d You reflect regularly on your own and other's experiences, and use these to inform future action.
- e You prioritise objectives and plan work to make best use of time and resources.
- f You set demanding but achievable objectives for yourself and others.
- g You create a sense of common purpose.
- h You balance agendas and build consensus.
- i You consider the impact of your own actions on others.

UNIT B1 DEVELOP AND IMPLEMENT OPERATIONAL PLANS FOR YOUR AREA OF RESPONSIBILITY

Knowledge and understanding

You need to know and understand the following:

General knowledge and understanding

- 1 Principles and methods of short-to medium-term planning.
- 2 The importance of creativity and innovation in operational planning.
- 3 How to develop and assign objectives which are SMART (Specific, Measurable, Achievable, Realistic and Time-bound).
- 4 How to analyse and manage risk.
- 5 How to develop and plan for contingencies.
- 6 Principles and methods of delegation.
- 7 How to use resources effectively to achieve objectives.
- 8 How to consult with colleagues and other key stakeholders.
- 9 How to monitor and control operational plans to achieve their objectives.
- 10 How to develop and use an evaluation framework.

Industry/sector specific knowledge and understanding

- 11 Legal, regulatory and ethical requirements in your sector.
- 12 Market developments in your sector.
- 13 Actual and potential competitors, and their strategies and plans.
- 14 Actual and potential partners, and their strategies and plans.

Context specific knowledge and understanding

- 15 The market in which your organisation works.
- 16 The overall vision of your organisation and the goals you are responsible for achieving.
- 17 Your organisation's actual and potential customer base.
- 18 Available market opportunities.
- 19 How to respond to market opportunities.

UNIT B1 DEVELOP AND IMPLEMENT OPERATIONAL PLANS FOR YOUR AREA OF RESPONSIBILITY

Context specific knowledge and understanding (continued)

- 20 Colleagues and other key stakeholders, and their needs and expectations.
- 21 Processes for consultation.
- 22 Sources of information you can use to monitor and evaluate plans.
- 23 Procedures for reporting and making recommendations.

UNIT B1 DEVELOP AND IMPLEMENT OPERATIONAL PLANS FOR YOUR AREA OF RESPONSIBILITY

Evidence requirements

In order to achieve this unit, you must demonstrate that you meet all the requirements of the unit. This means all of the stated outcomes and behaviours and every item of knowledge and understanding. Your assessor must be able to observe you in the workplace or you must provide the following **tangible evidence** to your assessor.

Please note that **simulation** is **not** allowed for this unit i.e. all your evidence must relate to real work activities.

| Outcomes | Evidence of Outcomes: • possible examples of evidence | Behaviours | Knowledge and Understanding | | |
|----------------------------------|---|------------------------|-----------------------------|-------------------|------------------------|
| | | | General | Industry specific | Context specific |
| O1 O2 O7 O8 | Operational plans that you have managed and reviewed: | | | | |
| | • data on past operational performance against plan that you have collected and analysed | a, c | 1, 9 | 2, 3, 4 | 1, 2, 3, 8 |
| | • notes or minutes of meetings and discussions that you have led to review operational plans and performance | a, c, d, g, h | 1, 9, 8 | 1, 2, 3, 4 | 1, 2, 3, 6, 7, 8 |
| | • reconciliation reports and variance analyses and proposals for changes to plans and operations that you have prepared | c, d | 1, 9, 10 | 1, 2, 3, 4 | 2, 9 |
| | • witness statements (comments on your role in reviewing and controlling performance against plans) | a, c, g, h | - | - | - |
| | • personal statement (reflections on your role in reviewing and controlling performance against plans) | a, d | 1, 9 | 1, 2, 3, 4 | 1, 2, 3, 6, 7, 8 |
| O1 O2 O3 O4 O5 O6 | Operational plans that you have developed and agreed: | | | | |
| | • proposals for developing new operational systems and procedures or reports of development projects you have led | a, b | 2, 7, 8 | 1, 2, 3, 4 | 1, 2, 3, 4, 5, 6, 7, 9 |
| | • risk assessments and cost/benefit analyses of proposed plans | c, i | 4, 5 | 1, 2, 3, 4 | 1, 4, 8 |
| | • operational or production plans, sales or other work plans or work schedules, objectives and targets that you have developed and agreed | a, b, c, e, f, g, h, i | 1, 2, 3, 4, 5, 6, 7 | 1, 2, 3, 4 | 1, 2, 3, 4, 5, 6 |
| | • witness statements (comments on your role in developing operational plans) | a, c, f, g, h | - | - | - |
| | • personal statement (reflections on your role in developing operational plans) | b, d, e, f, i | 1, 2, 3, 4, 5, 6, 7, 8 | 1, 2, 3, 4 | 1, 2, 3, 4, 5, 6 |